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AWARD CEREMONY AT IRVINE MARRIOTT | MARCH 20, 2025

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PNC 2025 Outlook: Lower Rates Present Opportunity for Mid-sized Businesses

By Bill Denny, Commercial Banking Market Leader Orange County & Inland Empire

Amid a sustained period of elevated interest rates, many mid-sized companies have postponed making significant investments that would help them grow their businesses throughout the last few years. But that may change in 2025, as the Federal Reserve looks to continue cutting interest rates.

The lower rate environment will have an impact on strategic business decisions in three important ways, according to Bill Denny, Commercial Banking Market Leader for Orange County & Inland Empire:

1. Capex spending – As rates start to come down, many mid-sized businesses are likely to increase their capex spend, given that the cost of capital will be less expensive. Technology is a logical area of focus for capex investment, as it can play a key role in streamlining operations, whether in the form of automation equipment or digital technology for managing processes. Strategic investment in technology is also critical for businesses to guard against fraud, which continues to be a growing challenge for companies across all sectors.

2. Mergers, acquisitions, and ownership transfers – A lower rate environment is also likely to lead to an uptick in merger and acquisition (M&A) activity, as a significant portion of mid-sized businesses are likely to be looking to make some sort of change in ownership, not just in 2025, but generally over the next few years.

3. Liquidity management – A change in interest rates presents a clear opportunity for businesses to examine their liquidity position and evaluate ways to maximize, including potentially updating their banking relationships.

While lower rates will be impactful, they aren't the only dynamic that will influence business strategy this year. "Lower rates will have an impact, but they're not the only factor shaping business strategies this year," said Denny. "Companies are still facing uncertainty around a possible recession, rising costs of inflation, and challenges with hiring and retaining employees. A well-rounded approach will be useful."

In Denny's view, as businesses execute their strategic plans in 2025, it's important that they keep an open dialogue with their bankers. "It's more important than ever to keep an open dialogue with banking partners. Navigating uncertain environments requires careful planning, and banking teams can offer valuable insights and guidance to help business leaders make strategic decisions with confidence."

Brilliant Begins Here

PNC Commercial Banking can offer insight into technologies, products, and processes that can help businesses seize opportunities, today and in the future. For more information, reach out to Bill Denny today at william.denny@pnc.com.

Bill Denny is the Commercial Banking Market Leader for PNC Bank in Orange County-Inland Empire.

Denny leads the Orange County-Inland Empire Commercial Banking business, overseeing business development, relationship management, and spearheading PNC's Commercial banking growth in Southern California. Additionally, Denny and his team integrate into local communities across the region, ensuring PNC actively contributes to their financial success.

Denny has worked in banking for over 20 years. Prior to joining PNC, he served as the Commercial Banking Market Leader in Orange County for Wells Fargo and before that, Denny spent 10 years as a college football coach with stints at Arizona State University, University of California-Berkeley, and Western Carolina University.

Denny is a graduate of Pacific Coast Banking School (PCBS) and the University of Washington's Executive Leadership Program. He earned a Master of Business Administration from Arizona State University and a Bachelor of Science in Accounting from The University of the Pacific.

PNC Financial Services Group, Inc. is one of the largest diversified financial services institutions in the United States, with an extensive coast-to-coast branch network, a presence in all 30 of the country's largest markets, and a

Find out more at pnc.com.

history dating back to 1865, providing retail banking, including residential mortgage, corporate and institutional banking, and asset management to individuals, institutions, and businesses of all sizes.



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An antiquated workspace can drive away clients, employees, *and* opportunities. Don't let your space hold your business back. A functional redesign ensures your space works for you—not against you.

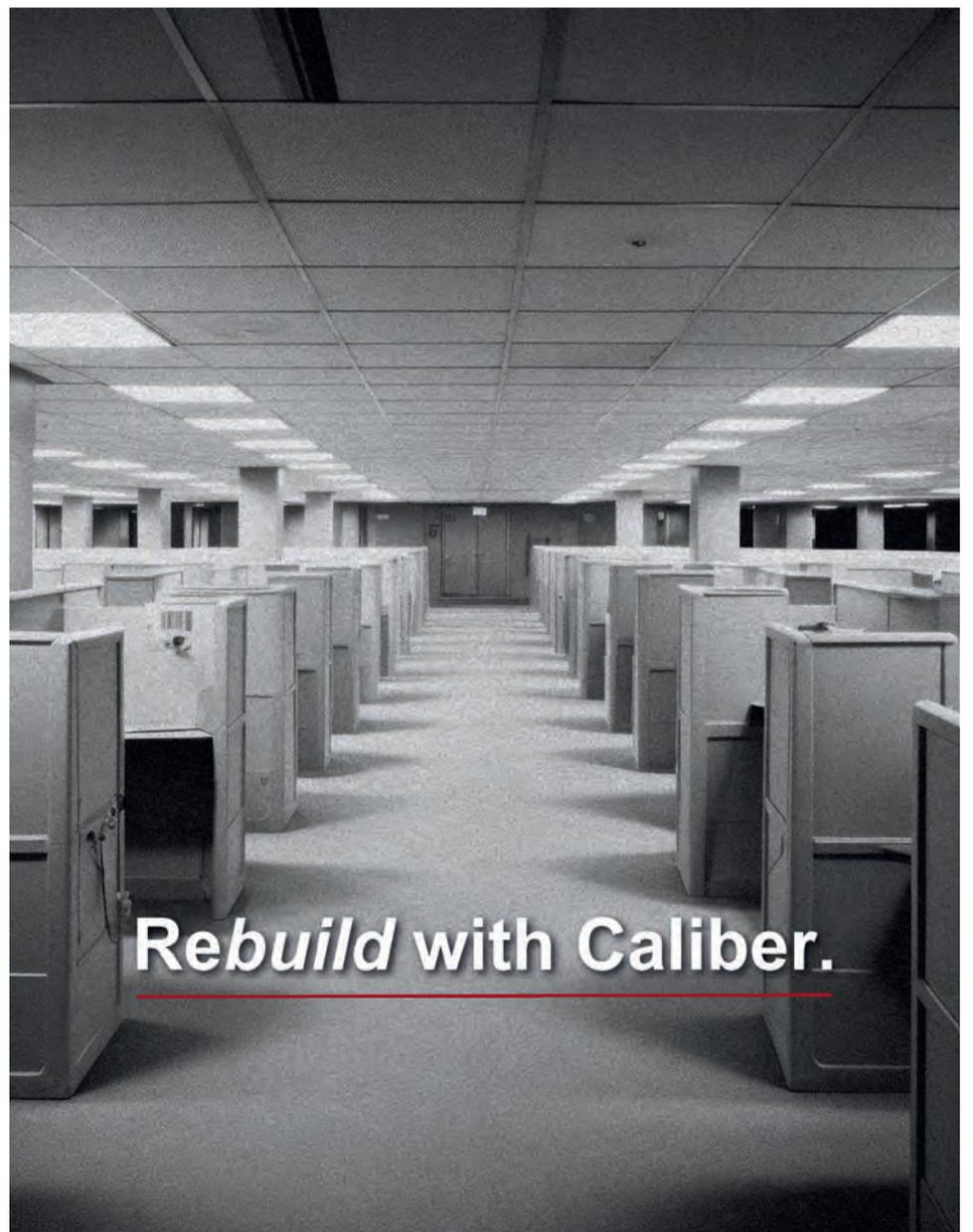
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Are you a corporate or nonprofit board member—or interested in becoming one?

The Forum for Corporate Directors is for you! We fuel a vibrant community of current and aspiring board members, executives and advisors with top-notch speakers, educational programming and networking opportunities. All events are live, right here in OC. Check out some of our upcoming events and experience FCD for yourself!



Educational events feature recognized experts and include breakfast, lunch or cocktails, with time for networking (November 2024's "Practical Solutions for the Modern Boardroom").



Join FCD members and guests at networking events like this cocktail reception at Newport Beach's Balboa Bay Club (September 2024).



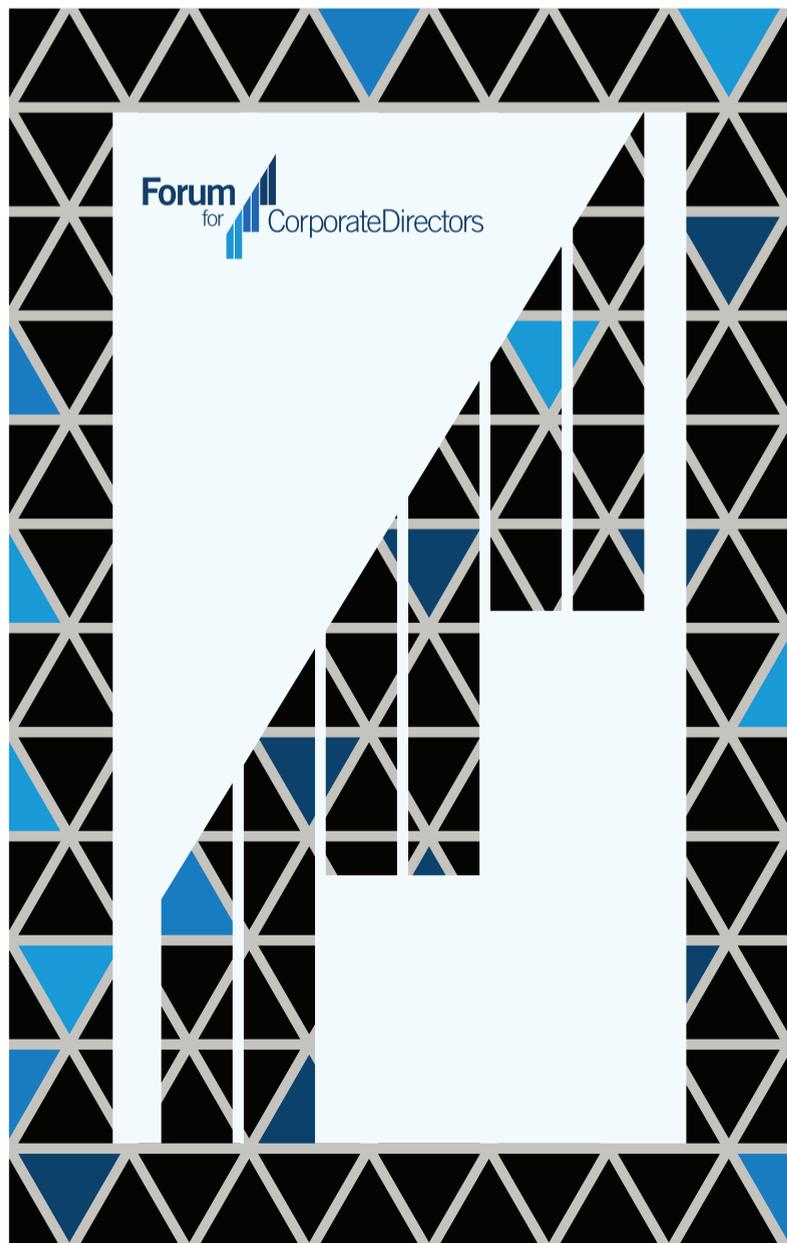
At FCD's Aspiring Directors event (April 2024), panelists share tips for securing a board seat. This year's event adds workshops on board bio creation and effective networking.



Access the insights and connections that matter.
Scan the QR code to learn more about FCD's upcoming events!



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2025 FCD

DIRECTOR OF THE YEAR AWARDS

Southern California's Premier Business Event of the Year

May 29, 5:00 – 9:00 PM at the Balboa Bay Resort

Please join us in recognizing and honoring the significant contributions made by these distinguished executives for their services in the boardroom.

HONOREES



COMMUNITY IMPACT AWARD

Cary Hyden
Board Director – Titan Health & Security Technologies, Omada Foundation for Children, Big Brothers Big Sisters



LIFETIME ACHIEVEMENT AWARD

Michael McKee
Board Director – Realty Income Corporation, First American Financial Corporation; Board Chair - TGR Foundation



CORPORATE GOVERNANCE AWARD

Aimee Weisner
Board Director – Glaukos Corporation, Lensar, Inc, Staar Surgical Company



ENHANCEMENT OF ECONOMIC VALUE AWARD

Glenn Welling
Board Director – BRCC, Inc

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Bridging Entrepreneurship and Philanthropy

BY SHELLEY M. HOSS, CHIEF EXECUTIVE OFFICER
ORANGE COUNTY COMMUNITY FOUNDATION

Orange County is a unique place where the spirit of innovation and entrepreneurial drive seamlessly intertwine with a generosity of spirit and a heartfelt commitment to uplift our most vulnerable neighbors. It's a community where business founders, owners, and investors are not only contributing to economic vitality but also using their success to make a lasting positive impact. Through the strategic use of philanthropy, many of Orange County's successful entrepreneurs are ensuring that their legacy extends far beyond their business achievements.

THE DUAL LEGACY OF BUSINESS AND PHILANTHROPY

For many entrepreneurs, their businesses are more than just sources of income; they represent a significant part of their identity. These enterprises reflect their character, embody their influence, and contribute to their wealth. When the time comes to transition, whether through sale or succession, these business leaders face the challenge of maximizing their financial gain while preserving their legacy. This is where strategic philanthropy becomes an invaluable tool.

At the Orange County Community Foundation (OCCF), we believe in harnessing the power of philanthropy to transform business transitions into opportunities for lasting impact. With nearly 650 charitable funds, OCCF has granted more than \$1.1 billion since its inception, making us the 7th most active grantmaker among more than 800 U.S. community foundations. This remarkable achievement is a testament to the generosity and forward-thinking spirit of our donors.

THE PILLARS OF PHILANTHROPY: INNOVATION AND DIY SUCCESS

One of the main factors contributing to the success of philanthropy in Orange County is the community's strong tradition of self-made success. This entrepreneurial mindset, marked by innovation and determination, not only drives economic prosperity but also fosters a thriving culture of generosity.

Moreover, the collaborative spirit that is alive in Orange County encourages business leaders to unite their efforts for a greater impact. They often participate in philanthropic ventures together, pooling resources and expertise to tackle systemic issues like education, health care, and housing insecurity. This collective approach not only amplifies their contributions but also inspires others in the community to join in the cause. This cycle of giving enriches the community, fostering a resilient and vibrant social fabric that benefits everyone.

STRATEGIC PHILANTHROPY IN BUSINESS TRANSITIONS

For business owners considering the future of their enterprises, integrating philanthropy into their transition plans can achieve dual objectives: maximizing financial returns and preserving their life's legacy. By working with OCCF, these leaders can develop tailored philanthropic strategies that align with their values and long-term goals.

Key Benefits of Strategic Philanthropy:

- **Tax Efficiency:** Charitable planning can offer significant tax advantages, helping business owners reduce capital gains taxes and estate taxes, while still achieving their charitable objectives.
- **Legacy Preservation:** Through philanthropic endeavors, entrepreneurs can ensure their values and vision continue to influence the community long after they have exited their businesses.
- **Community Impact:** By directing charitable assets towards causes they care about, business leaders can address critical community needs, support innovation, and create opportunities for the most vulnerable.

To learn more about how Orange County Community Foundation works with and supports business owners and founders through strategic giving, contact Margita Blattner at mblattner@oc-cf.org.

EMPOWERING THE NEXT GENERATION OF PHILANTHROPISTS

OCCF is committed to nurturing the next generation of philanthropists who will continue to drive the county's tradition of giving. Through educational programs and collaborative initiatives, we empower young leaders to engage with their communities and foster a lifelong commitment to philanthropy.

Our efforts focus on cultivating a culture where giving is not just a financial transaction but a meaningful part of life. By instilling values of empathy, responsibility, and community engagement, we aim to inspire future philanthropists who will carry forward the legacy of Orange County's spirit of giving.

FOR GOOD, FOR EVER

The Orange County Community Foundation is honored to serve as the heart of philanthropy in Orange County. We are deeply grateful for the trust and generosity of our donors, who make it possible for us to support a broad range of initiatives that address pressing social issues, foster innovation, and help build an Orange County where all have the opportunity to thrive.

Together, we are building a community where entrepreneurship and philanthropy go hand in hand, where success is measured not only by economic gains but also by the positive impact we make on the lives of others. As we look to the future, we remain committed to our mission: to transform our community's heartfelt intention into greater impact for good.

In a world where challenges often seem insurmountable, Orange County stands as a beacon of hope and innovation. Here, the best of the head meets the best of the heart, and through the collaborative efforts of our business and philanthropic leaders, we are shaping a brighter, more promising future for all. Join us in this journey of transformation and impact, and together, let's build a legacy that endures.

We are honored to be Orange County's community foundation—for good, for ever.

Is a business exit in your future?

Join other entrepreneurs at our upcoming event...

**Strategic Exit Planning:
Maximizing Your Personal Value and Impact**

Learn more about:

- The importance of strategic exit planning
- Best practices to help guide you in the planning process
- Creating a meaningful legacy through savvy, tax-advantaged giving

**FEBRUARY 11, 2025
12:00 PM - 2:00 PM**



Register Today!

Questions?
949.553.4202 | events@oc-cf.org



Shelley M. Hoss

 Orange County
Community Foundation

“Effective philanthropy requires a lot of time and creativity – the same kind of focus and skills that building a business requires.”

- Bill Gates



Donor-Advised Funds

Donor-advised funds are convenient, flexible tools, allowing you to support the causes you care about most while OCCF handles all administrative, legal, and reporting requirements.



Gifts of Appreciated Assets

OCCF accepts a wide range of appreciated assets for maximum flexibility and convenience, including public securities, real estate, privately held business interests, cryptocurrency, and more.



Business Exit Planning

OCCF helps business owners consider when and how to incorporate charitable giving into their business succession planning to maximize financial benefits.



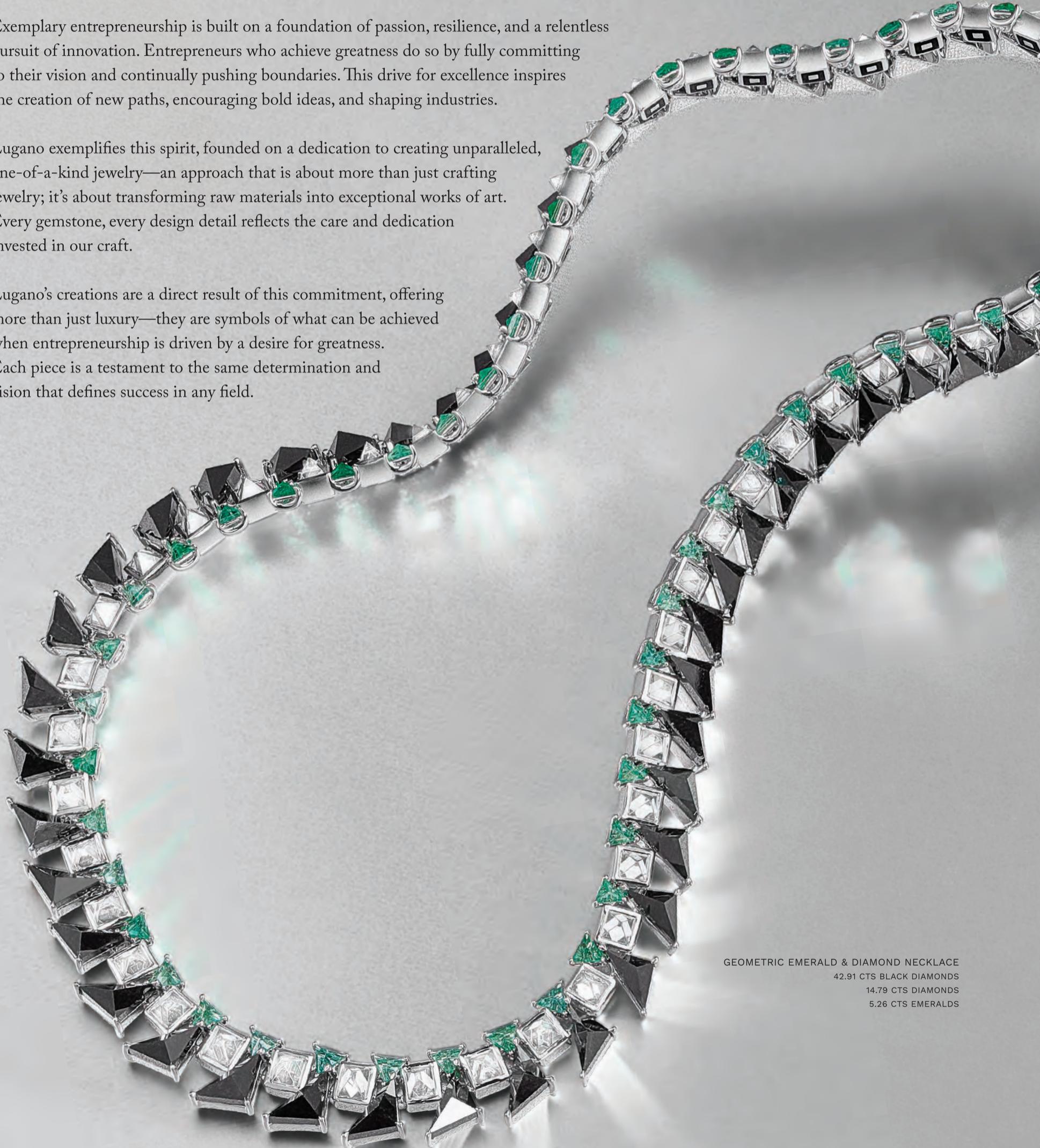
LUGANO *celebrates*

EXCELLENCE *in* ENTREPRENEURSHIP

Exemplary entrepreneurship is built on a foundation of passion, resilience, and a relentless pursuit of innovation. Entrepreneurs who achieve greatness do so by fully committing to their vision and continually pushing boundaries. This drive for excellence inspires the creation of new paths, encouraging bold ideas, and shaping industries.

Lugano exemplifies this spirit, founded on a dedication to creating unparalleled, one-of-a-kind jewelry—an approach that is about more than just crafting jewelry; it's about transforming raw materials into exceptional works of art. Every gemstone, every design detail reflects the care and dedication invested in our craft.

Lugano's creations are a direct result of this commitment, offering more than just luxury—they are symbols of what can be achieved when entrepreneurship is driven by a desire for greatness. Each piece is a testament to the same determination and vision that defines success in any field.



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LUGANO



Celebrating Excellence in Entrepreneurship: Honoring Visionaries Who Inspire

By Ivo A. Tjan, CEO
CommerceWest Bank

At CommerceWest Bank, we believe that entrepreneurship is the cornerstone of innovation and economic growth. We are proud to support and celebrate the winners and nominees of the Excellence in Entrepreneurship Award, recognizing their remarkable achievements and unwavering dedication.

A Human-Centric Approach to Banking

In today's fast-paced financial landscape, many institutions have shifted towards automated services, often at the expense of personal connection. At CommerceWest Bank, we pioneered the digital banking experience since our inception in 2001 and differentiate ourselves by embracing a human-centric approach. We understand that our clients are not just account numbers; they are individuals with unique stories, aspirations, and challenges.

Our mission is to create a complete banking experience tailored to each client's specific needs, providing high-quality, low-stress, and personally tailored financial services. We are redefining banking for entrepreneurs, small, and mid-sized businesses in our community.

Building Relationships Beyond Transactions

Our commitment to a human-centric approach means that we prioritize building genuine relationships with our clients. We take the time to understand the intricacies of their businesses, offering flexible solutions that accommodate their unique requirements. This personalized service ensures our clients feel valued and understood, fostering trust and long-term partnerships. No one client has the same experience at CommerceWest Bank because the clients we work with qualify for customized loans, treasury management products, and/or checking accounts that are tailor-made to meet their specific needs.

Empowering Entrepreneurs

Entrepreneurs are the visionaries who drive innovation and create opportunities within our communities. By providing tailored banking solutions, we empower these leaders to focus on what they do best—growing their businesses and making a positive impact.

As a full-service business bank, we offer a wide range of commercial banking services, remote deposit solutions, online banking, mobile banking, lines of credit, working capital loans, commercial real estate loans, SBA loans, and treasury management services.

However, our support extends beyond traditional banking services; we offer resources, guidance, and a network to help entrepreneurs navigate the challenges of business ownership.

A Commitment to Personalized Service

In an era where many banks are moving towards impersonal, automated services, CommerceWest Bank remains steadfast in its commitment to personalized banking.

We believe that technology should enhance, not replace, the personal relationships we build with our clients.

Our approach ensures that clients receive the attention and customized solutions they deserve, reinforcing the notion that they are more than just numbers—they are valued partners.

Recognizing Excellence

The Excellence in Entrepreneurship Award celebrates individuals who have demonstrated exceptional leadership, creativity, and perseverance. These entrepreneurs exemplify the spirit of innovation, turning ideas into successful enterprises. Their achievements inspire others and contribute significantly to the economic vitality of our communities.



At CommerceWest Bank, we strive for excellence in everything we do, simply because our clients deserve it.

Our forward-thinking approach navigated our company to be ranked as one of America's Best Regional Banks and Credit Unions in 2025 by Newsweek. We were recognized in the Annual List of the Top 100 Publicly Traded Community Banks, named to the OC500 Directory of Influence in 2024, recognized as one of the Strongest Banks in the Nation by Bauer Financial, and one of the 2024 Fastest-Growing Public Companies.

We are deeply committed to making a meaningful impact—not just in the lives of our clients, but throughout our community. Together, the Bank and our employees proudly raise tens of thousands of dollars annually for Southern California nonprofits. Our efforts are especially focused on organizations that hold a special place in our hearts: those dedicated to supporting children, individuals with disabilities, people facing hardships, and those bravely battling life-threatening illnesses.

Conclusion

At CommerceWest Bank, we are honored to support the Excellence in Entrepreneurship Award winners and nominees. Our human-centric approach to banking reflects our dedication to understanding and serving the unique needs of each client. By fostering genuine relationships and providing tailored solutions, we empower entrepreneurs to achieve excellence and drive positive change within our communities.

Congratulations to all the award winners and nominees. Your vision, determination, and success are truly inspiring.

Ivo A. Tjan, Chairman & CEO

Ivo A. Tjan is Chairman, President, and CEO of CommerceWest Bank

Mr. Tjan is committed to making a difference in the lives of his clients, in helping businesses achieve their goals, and in supporting his community. Through his innovative leadership, he has created a unique and highly acclaimed company with personally tailored services for small and middle-market businesses. He can be reached at itjan@cwbank.com



GREAT RESULTS
BEGIN WITH
GREAT RELATIONSHIPS



FALCON
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We empower clients to tap into our cross-departmental capabilities and network of professional relationships. This collaborative approach works because **your success defines ours.**



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Protecting Families of Wealth from Themselves: Lessons from HBO's *Succession*

The wealth planning industry recently has been under scrutiny, often negatively and unfairly portrayed for its work with high-net-worth families across the globe. This perception, amplified by massive data leaks such as the “Pandora Papers” and the “Panama Papers,” has prompted certain media outlets to cast legal and highly sophisticated planning work done for families in an undeservedly nefarious light. Too often, prudent tax planning is mischaracterized as tax evasion, privacy labeled as secrecy, and asset protection as unethical—despite the fact that these strategies are designed and carefully executed under the laws of progressive and highly regulated U.S. trust jurisdictions.

Very much to the contrary, the work done in the wealth planning industry for families of extreme wealth is both virtuous and vital. When properly and legally implemented, planners safeguard legacies and ensure that wealth is preserved and protected across multiple generations—indeed protecting families of wealth from themselves—addressing the complexities of preserving wealth and family harmony amid extreme affluence and intergenerational dynamics.

HBO's hit series *Succession* offers a compelling lens into what can go wrong when these complexities and challenges go unaddressed and highlights the critical need for strategic trust planning, modern trust laws, and effective family governance among ultra-high-net-worth families.

The Roy Family: A Cautionary Tale

Reportedly inspired in part by the life of media mogul Rupert Murdoch, *Succession* provides a dramatized but cautionary illustration of the pitfalls families with substantial wealth often face—and why protecting the next generation from themselves is critical. The fictional Roy family, led by patriarch and first-generation wealth creator Logan Roy, built a global media empire worth billions. Yet their story is one of dysfunction, characterized by power and control struggles, wealth preservation and asset protection challenges, and personal crises, particularly among the second generation of siblings.

While the show's drama is exaggerated for entertainment, the challenges depicted are sadly all too real for ultra-high-net-worth families, with issues often rooted in:

- Lack of clear and proper trust or succession planning, creating intense rivalry and family conflict among second and subsequent generations.
- Inadequate preparation of the next generation for the responsibility of running a business and handling extreme wealth.
- Absence of clear governance and communication structures.

Safeguarding Wealth and Family Harmony: The Role of Modern Trust Law and Situs Selection

Modern trust laws, particularly in top-tier trust jurisdictions like South Dakota, offer powerful planning tools to address the very challenges that plagued the Roy family. These tools keep control with trusted family advisors and are designed to protect next and subsequent generations from themselves while fostering harmonious family relations and multi-generational wealth preservation. By placing a family-owned business and wealth into a well-settled trust, first-generation wealth creators can:

- Designate specific heirs to inherit wealth and business operations

over multiple generations.

- Reduce state and federal tax liabilities.
- Obtain privacy and confidentiality.
- Achieve asset protection.
- Maintain direction and control over trust assets.
- Educate and prepare next and future generations.

All of this can be achieved by leveraging the sophistication of South Dakota's progressive and cutting-edge trust laws, as they provide innovative and effective solutions for families through:

- **Dynasty Trusts:** The cornerstone of multigenerational wealth preservation, empowering families to avoid estate taxation and establish enduring legacies.

- **Privacy and Confidentiality:** How privacy laws like South Dakota's can shield family wealth from unnecessary disclosure, enabling discretion and reducing conflict.

- **Domestic Asset Protection Trusts:** Safeguarding family wealth from external threats, lawsuits, and intra-family disputes.

- **Directed Trusts:** A revolutionary model that unbundles asset management and trust administration functions, ensuring settlors and advisors maintain control over aspects of trust administration and wealth transfer.

- **Family Governance:** Critical to ensuring that wealth serves as a tool for empowerment rather than a source of division.

- **Private Trust Company:** A tailored approach for families managing complex assets to preserve wealth, plan for succession, and maintain control over their wealth.

Beyond Succession: Lessons Learned

While *Succession* is great entertainment, the lessons learned serve as a stark reminder of the perils facing families with extreme wealth. Too often, destructive human tendencies—greed, rivalry, jealousy—are exacerbated by poor planning and a lack of communication, destroying ultra-high-net-worth families and individual family members over generations.

However, next and subsequent generations can be well protected from themselves and avoid disruptive family dysfunction by simply selecting the proper trust jurisdiction, such as South Dakota, engaging powerful modern trust laws, and participating in effective family governance strategies.

If you are looking for further information on any of the tools and strategies discussed, we invite you to visit our website at www.bridgeford-trust.com and contact Bridgeford Trust Company's team at info@bridgefordtrust.com.

While all trust administration and corporate governance functions at Bridgeford Trust Company are performed and executed through our two offices in South Dakota, education, planning, and marketing activity is coordinated through Bridgeford Advisors, Inc. dba Bridgeford—a legally distinct sister company of Bridgeford Trust Company—with locations in California, Florida, Pennsylvania, and South Dakota. To connect with our team in California, please contact David Warren, President & CEO of Bridgeford, at dwarren@bridgefordadvisors.com or by calling (949) 798-6262.



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“ Our company loves to build relationships. It's at the core of who we are, and in part, we wanted our customers to be able to come to us and to have a space that represents our brand, a brand of quality, sustainability, integrity and innovation. ”

VINCENT CURCIE | CEO & Founder, OC Solar

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Increasing Opportunities for High-Achieving Students

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"I was born and raised in Japan, but I was reborn and reraised in the U.S. at Cal State Fullerton."

- Ryutaro Ichihara

CSUF ALUMNUS TURNS PASSION FOR SOCCER INTO RESEARCH CAREER

Growing up in Japan, Ryutaro Ichihara's life revolved around soccer. His passion for sports led him to Cal State Fullerton's kinesiology program, where he collaborated with faculty experts to conduct research on the authenticity of sports in Western culture and how individuals with cerebral palsy experience physical activity.

The two-time CSUF alumnus presented his findings at multiple academic conferences, was named the university's 2024 Outstanding Graduate Student, and found his purpose in teaching sports philosophy.

Ryutaro and Ramadhan are just two examples of graduates who experienced Cal State Fullerton's commitment to advancing student success.

From admission to commencement, CSUF provides opportunities for Titans to pursue their passions, launch their careers and reach their fullest potential.

Learn more at fullerton.edu/opportunity



"Ever since I was in seventh grade, Cal State Fullerton has been an instrumental part of my life."

- Ramadhan Ahmed

BIOLOGY GRAD ACCEPTED TO 17 ELITE MEDICAL SCHOOLS

At Cal State Fullerton, Ramadhan Ahmed began working toward a career in health care, studying biological science and gaining hands-on experience through the innovative Bridges to Stem Cell Research program.

Ramadhan scored in the 97th percentile on the MCAT and was accepted to 17 top medical schools. He was offered 12 scholarships, including a full ride to Johns Hopkins University, where he now is a medical student.

Cal State
Fullerton.



THE NEXT GIANT LEAP STARTS RIGHT HERE IN ORANGE COUNTY

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Cal State Fullerton.

SIX BEST PRACTICES TO KEEP YOUR BUSINESS SALE-READY

How hot is your company? Would you give it a solid 10 out of 10? What rating would others give it? Even if selling your company is the furthest thing from your mind, assessing its attractiveness and saleability should be a regular priority—a way to make sure you're optimizing your resources and your balance sheet.

As the owner, you may be too close to the business to be fully objective. An outside perspective from a partner like Whittier Trust can help ensure your company is operating at peak performance and is set up to continue doing so, with or without you. Clients who have the most successful sales start thinking about the steps early and create a vision for their ideal transition out of the business. Whittier works with you through the process, in collaboration with trusted consultants. At the same time, we address your personal goals, from day-to-day concerns like cash flow needs to big-picture items, such as what sort of legacy you hope to leave.

If you want to rest assured that your business is ready for sale or transition at any time, here are six best practices recommended by Whittier Trust's exit planning team. Working through each of these items will boost your company's value, giving you the strongest possible position when it comes time to negotiate.

1. Make sure your company can thrive without you.

It's likely that your particular skills and personality have played a large role in your company's success. That's why this is often the hardest step. It's vital to make sure key associates can ensure continuity across all aspects of the business, including customer and vendor relationships, your brand, and your company culture. And that those staff members will stay with the organization if it is sold or you leave.

2. Get your house in order.

Your business systems, processes, and facilities are a significant part of your value, so it's time to delve into details you may have trusted others to handle for years. You'll want to be sure no systems are out of date, no short-term fixes are masking underlying problems, and no areas of risk are making you vulnerable. You may be able to identify underutilized aspects of the business where you could gain some profit or advantages. And you need to be confident staff are trained and productive, with built-in redundancies. Ask yourself: What will a prospective buyer see if they look under the hood?

3. Audit yourself.

Your accountants should be able to assure you that your financials are in auditable shape, but a true due diligence audit goes far beyond income statements and balance sheets. Contracts, licensing, insurance, intellectual property, legal actions, capital structure, and outstanding debt all need to be scrutinized, resolved or finalized, and clearly documented.

4. Remember that timing is everything.

There's a lot of lead time required for company transitions, and you want to be ready when the market is strong and conditions are right for a merger, sale, or other major change. So the time to start talking

with consultants about improvements is now. Investing in the business today will pay off in a more valuable company tomorrow.

5. Don't shy away from the personal.

It's your family business, so every decision has implications for your personal wealth and well-being. Have you thought through your post-sale goals? Do you know how changes will affect your immediate family as well as extended family involved in the business? Do you have an estate plan, financial plan, and philanthropic and tax objectives? It's easy to think that personal matters can wait until later, but a holistic approach will decrease stress for you and your family, and a partner like Whittier Trust can tackle both business and personal objectives at the same time.

6. Mark your calendar to "repeat" automatically.

Unfortunately, this assessment process is not a one-and-done. Neither your business nor your personal life are completely predictable, so you'll need to re-evaluate next year (assuming you haven't sold the business by then). Being prepared for the unexpected is always good business.

In addition to helping you realize the highest value from the sale of a business, Whittier Trust is also committed to you and your family for life after the sale. As the oldest multifamily office headquartered in the West, we have guided hundreds of clients through family business transitions and through the tax, investment, and personal implications of significant liquidity events. (Keep in mind that if you're considering a distribution of wealth among family members, the next year is a critical time period because of the 50% cut in the Lifetime Gift Tax Exemption that goes into effect on January 1, 2026.)

Engaging your own Whittier multifamily office gives you a personal, custom team of advisors to handle the day-to-day demands of wealth management. We get to know your family's hopes and challenges, and we facilitate communication among family members so everyone understands the decisions being made. Whether you're navigating succession questions, estate plans, or charitable options, we help manage family dynamics and foster family continuity from one generation to the next. From the moment you begin contemplating selling your business to days spent enjoying grandchildren and hobbies, Whittier's team of experts is there to ensure you meet your business and personal goals.



ELIZABETH M. ANDERSON
VICE PRESIDENT

Liz is a Vice President with Whittier Trust Company, and her primary focus is developing new relationships. Whittier Trust is the oldest multifamily office headquartered in the West.

To learn more go to whittiertrust.com



ASHLEY FONTANETTA & HER DOG, DOC
SENIOR VICE PRESIDENT, CLIENT ADVISOR

Investment and Wealth Management Services are provided by Whittier Trust Company and The Whittier Trust Company of Nevada, Inc. (referred to herein individually and collectively as "Whittier Trust"), state-chartered trust companies wholly owned by Whittier Holdings, Inc. ("WHI"), a closely held holding company. This document is provided for informational purposes only and is not intended, and should not be construed, as investment, tax or legal advice. Past performance is no guarantee of future results and no investment or financial planning strategy can guarantee profit or protection against losses. All names, characters, and incidents, except for certain incidental references, are fictitious. Any resemblance to real persons, living or dead, is entirely coincidental.

The right partnership feels effortless.

Just as trust is built over time, finding the right wealth management partner should come naturally. Whittier Trust is committed to supporting the needs of our professional partners in the legal and accounting communities. We seek to bring value to you by delivering on expectations and fulfilling on promises made. Together, we can turn dreams into reality.



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Are You Ready to Simplify and Save Guaranteed?

Are You Overpaying for Shipping Without Realizing It?

A Little-Known Fact About Shipping Expenses

Most companies—even major brands and corporations—are unknowingly **overpaying** for transportation costs. The reality is, **hidden fees, inefficient carrier contracts, and complex pricing structures** often result in unnecessary expenses.

This is where **CPC Consultants**, a **Costa Mesa-based** firm with a proven track record, comes in. CPC specializes in **uncovering and eliminating transportation overcharges**, transforming existing shipping programs to:

- Reduce costs
- Optimize efficiencies
- Simplify carrier complexities

Unlike other firms, CPC goes a step further by **guaranteeing savings performance**—or clients receive their fees back. With **transportation savings averaging 15% to 40%** (depending on the shipping mode), CPC has saved companies **millions of dollars each year**.

Guaranteed Savings – With Nothing to Lose, Everything to Gain

Getting started is easy. CPC offers a **free, no-obligation assessment** to identify **real savings opportunities—guaranteed**. The best part? The **assessment is 100% free** and can be completed **within days**.

- No upfront costs
- No risk
- Only results

See CPC in Action

CPC was recently featured on **Inside the Blueprint**, a television series highlighting industry innovators. Watch the segment to see **how CPC's expertise is reshaping the logistics landscape**.

- **Watch Now:** Inside the Blueprint: CPC Consultants
<https://insidetheblueprint.com/brands/cpc-consultants/>

What CPC Clients Say

"CPC significantly impacted my bottom line and over-delivered on their promise. I highly recommend them as a trusted savings partner."
— Senior Director, Kawasaki Motor Corporation

"Even one year after the project and over one million dollars in savings, I still receive kudos from upper management. CPC makes me look good."
— Director of Transportation, FujiFilm Holdings, USA

"After we implemented CPC's solution, in addition to the promised savings, we streamlined auditing and removed two post auditors."
— National Manager, Toyota Motor Sales

"CPC Consultants became a trusted partner, supporting us at every stage of our growth... reducing costs by 20% and improving throughput by 10X."
— CFO, Nordstrom Rack.com

Meet the Expert Behind CPC

Charles, Founder and Principal of CPC Consultants, has over **40 years of experience** in the logistics industry. **Fluent in Japanese**, he leverages his **cross-cultural expertise and deep supply chain knowledge** to help multinational companies **eliminate hidden profits taken by transportation providers—leveling the playing field** for shippers.

Learn more: www.cpc-consultants.net
Contact: 949-645-4087



Charles Popick

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- International Transportation Sourcing and Optimization
Ocean - FCL, LCL & Consol. Airfreight, Small Parcel
- Warehouse Solutions
Site Location Studies, Space Optimization, Business Process Re-Engineering



FREE ASSESSMENT

Submit 6-12 months of your transportation data to be analyzed

We generate a free assessment to determine how much you could be saving, average savings - 30%



RFP PROCESS

We help you optimize your carriers and contracts to secure best-in-class rates for all modes

We provide transportation agreements to ensure carriers are held to best-in-class service and standards



ANALYTICS

Savings and compliance are tracked to ensure new rates are implemented and savings are achieved

www.CPC-Consultants.net



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Royal American Diamonds & Royal Asscher Diamonds Unveil Largest Royal Asscher Cut in Its History:

A 20-carat Colorless near Flawless Masterpiece Crafted for a Special Client

Royal American Diamonds is a private jeweler offering rare investment-grade diamonds and gemstones set in stunning bespoke jewelry. Royal American Diamonds have setup a unique and exclusive partnership with Royal Asscher Diamond Company of the Netherlands, the iconic and innovative diamond house renowned for its mastery in diamond cutting since 1854.

Together we are proud to announce the delivery of the largest Royal Asscher Cut diamond in its storied history of 171 years. The 20-carat, near colorless diamond represents a remarkable achievement in both artistry and precision, crafted to perfection through Royal Asscher's bespoke diamond service.

Royal American's special client was seeking the ultimate expression of elegance and individuality, with an extraordinary diamond, custom-designed for her. This remarkable diamond was carefully selected, crafted, and polished by Royal Asscher's most skilled artisans. The Royal Asscher diamond ring has exceptional color, near-flawless clarity and fantastic cut – together with the remarkable 20 carat size, exemplifies the partnership of Royal American and Royal Asscher's dedication to deliver exceptional jewels that honor both tradition and luxury.



Jeff Sherwood – Co-Founder, Chief Executive Officer, Valaree Wahler – Co-Founder, Chief Design Officer and Lita Asscher, Co-President, Royal Asscher Diamond Company,

Jeff Sherwood, President of Royal American, commented, "Royal Asscher Diamonds are beyond compare - more than just diamonds, they are masterpieces of light and brilliance. Cut with unparalleled precision and devotion to beauty, they radiate a fire and elegance that no other diamond can match. Once you see a Royal Asscher, no other diamond will ever look the same."

Lita Asscher, President of Royal Asscher commented, "We are thrilled to partner with Royal American Diamonds and their clients, entrusted with this remarkable diamond-cutting commission – this has truly given us an opportunity to push the boundaries of our artistry and craftsmanship. The partnership truly marks a significant collaboration, strengthening our shared commitment to the world of fine diamonds."

For more information about Royal American Diamond Company, the Co-Founders – Valaree Wahler / Chief Design Officer and Jeff Sherwood, Chief Executive Officer, please visit www.royalamericandiamonds.com.

For more information about Royal Asscher Diamond Company, and Lita Asscher / Co-President, who is the sixth-generation family member to run the company, please visit www.royalasscher.com.



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We are grateful you're our leader."

– Avid Bioservices Employees

Congratulations Nick Green on your Excellence in Entrepreneurship Award Nomination



Nick Green
President & CEO



Discover the **Avid** effect.™

DIVORCE 2.0

TACKLING CRYPTOCURRENCY

By Paul Nelson, Esq



Buckle up, digital desperados! Your local divorce gladiator from the sun-soaked shores of Newport Beach is here to slice through cryptocurrency marital mayhem like a hot knife through blockchain butter.

The New Era of Divorce

Picture this: I'm in my office, sipping a green smoothie, when a client bursts in, insisting his Bitcoin stash now exceeds the value of the family yacht. Meanwhile, another claims her soon-to-be-ex is running an Ethereum mining operation in his office, turning his tax-deductible electricity meter into a slot machine.

Asset Division Challenges

Welcome to Divorce 2.0, where asset division feels like a game

of financial hot potato played with invisible spuds. Our forensic accountants are popping Advil like Tic Tacs, and judges are frantically Googling "What is a blockchain?" between hearings.

Transparency is Key

But listen up, crypto cowboys and cowgirls: trying to hide your digital gold is as futile as burying it on the beach. The blockchain may be a maze, but the law's got a map. So whether you're HODLing for dear life or panic-selling faster than a surfer spotting a shark, transparency is key.

Conclusion

Remember, in Newport Beach divorces, we divide everything – from ocean views to virtual vaults. So saddle up your digital steeds, and let's ride this crypto rollercoaster together!



Paul Nelson is the founder of **Nelson Kirkman Family Law Attorneys**, a premier California firm specializing in high-net-worth divorces. **Certified by the State Bar of California Board of Legal Specialization in Family Law**, Paul brings extensive courtroom experience and a deep command of California family law to every case. His strategic approach and

relentless advocacy have earned him a reputation for securing exceptional results for business owners, entrepreneurs, and high-earning professionals navigating complex divorce proceedings.

Recognized among the legal elite, Paul holds the prestigious **AV Preeminent rating from Martindale-Hubbell**, boasts

twenty five-star ratings on Avvo, and has been consistently honored by **Super Lawyers**.

A thought leader in the legal community, Paul's insights have been featured in **Forbes**, **Fortune**, and the **Orange County Business Journal**. He is also the author of the **Amazon best-selling book, *The Dissolution Solution***, which provides a strategic roadmap for high-asset divorces.

Paul is an active member of the **Orange County Bar Association**, the **State Bar of California**, and the **J. Reuben Clark Law Society**.

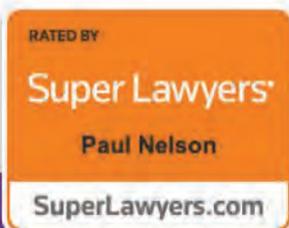
With a practice built on discretion, precision, and results, Paul ensures his clients emerge from their legal battles positioned for success—both personally and professionally.

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Paul Nelson, Esq

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Nelson Kirkman is the law firm that discerning clients turn to when their family law issues are challenging and complicated.

Opposing counsel and judges know our history of trial success. These facts often combine to force a speedy resolution.

We fervently prepare to move towards early settlement.

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2025 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

1105 Media, Newport Beach*Rajeev Kapur, CEO*

Over a 30-year career Rajeev Kapur has been part of the leadership team at Dell where he built a \$1 billion+ plus business in the US and managed Dell's China and South Asia business to record growth. Currently he is CEO of 1105 Media, the premier B2B Marketing, Events, and Media technology services company. Through its TDWI division, the company is one of the largest Big Data and AI training companies in the country. It's Converge division is top three for marketing services in the Cloud and Cybersecurity sector. In May of 2024, Kapur was named a finalist for the Ernst and Young Entrepreneur of The Year Award. He's also a 2x bestselling author via his leadership book - Chase Greatness, and AI Made Simple: A Beginner's Guide to Generative Intelligence. He is also co-founder and Chairman of Gen AI Advisers, a leading C-Suite AI advisory company.

**608 Dahlia, Corona del Mar***Jessica Roy, Executive Chef-Owner*

Executive Chef and owner-operator Jessica Roy was born and raised in Orange County, California, and is the creative force behind 608 Dahlia, which opened in 2021. Celebrating fresh, California flavors, Chef Roy's cuisine is deeply influenced by her passion for gardening and cultivating healthy food. At 608 Dahlia, she provides a true garden-to-table experience, often hand-picking garnishes and herbs from her own garden. Committed to sustainability, she supports local purveyors and eco-conscious businesses, earning her restaurant a Level One Certified Green Restaurant status. With over a decade of professional cooking experience, including work in a three Michelin star restaurant, and two national TV show cooking competition wins, Chef Jessica Roy shares her culinary passion with her community and beyond.

**Albright, Yee & Schmit, APC, Newport Beach***Clifton Albright, President & Founding Partner*

Clifton W. Albright is the president of Albright, Yee & Schmit, APC (AY&S), a California-based law firm formed in 1982. AY&S specializes in providing legal representation for employment, labor and tort defense to governmental and private entities. Mr. Albright was appointed to the Industry Trade Advisory Committee on Small and Minority Business (ITAC11) by former President Barack Obama and President Donald Trump. Mr. Albright travels to Washington, D.C. to meet with government officials on international trade and trade relations. Among his accolades, Mr. Albright was selected by his peers for Inclusion in The Best Lawyers in America (2023 - 2025) in the area of Litigation - Labor and Employment. He was a recipient of the 2023 FAME Church LA 'Law & Justice Award' and recognized among the LABJ's 2023 and 2024 Leaders of Influence: Litigators & Trial Attorneys Mr. Albright was recognized among the Daily Journal's 'Top Labor & Employment Lawyers' since 2022. In 2017, Mr. Albright was named 'Lawyer of the Year' by the Greater Los Angeles African American Chamber of Commerce.

**Alpha Motor Corporation, Irvine***Edward Lee, Founder & CEO*

Edward Lee is the founder and CEO of Alpha Motor Corporation, a cutting-edge electric vehicle manufacturer based in Irvine, California. Under his leadership, Alpha Motor was named California's Electric Vehicle Manufacturer of the Year (2023) by Corporate LiveWire Global Awards. The company has also received recognition from both the U.S. House of Representatives and the California State Assembly for its commitment to sustainability, innovation, and high business standards. With over 21 years of experience in the automotive industry, Mr. Lee has earned several prestigious accolades. These include being named "Best Motor Vehicle Manufacturing Chairman of the Year 2024 (North America)" by CEO Monthly and receiving the "Excellence in Executive Leadership in Innovation" award from California State University, Fullerton. He has also been recognized as a 2024 Marquis Who's Who Honoree. Mr. Lee holds more than 20 patents and has worked with leading global automotive brands such as General Motors, Audi, Toyota, and Hyundai. He holds a B.S. in Industrial Design from ArtCenter College of Design in Pasadena, California.

**AmeriPharma, Harper's Pharmacy, Santa Ana***Andrew Harper, CEO & Founder*

Andrew Harper, CEO and founder of Harper's Pharmacy and AmeriPharma, has established himself as a visionary leader in the pharmaceutical industry. Under his guidance, AmeriPharma has grown into a leading provider of specialty, infusion, and long-term care pharmacy services, with a commitment to exceptional patient care and innovative solutions. Harper's entrepreneurial spirit has driven the company's exponential growth, earning it accolades for customer satisfaction, operational excellence, and cutting-edge technology integration. With a strong focus on community impact and patient well-being, Harper has built AmeriPharma into a trusted healthcare partner in Orange County and beyond.

**Athletes First, Laguna Hills***Brian Murphy, Co-Founder, CEO, President*

Brian Murphy founded Athletes First in 2001 and serves as the firm's CEO & President. Through Brian's leadership, Athletes First has grown from an elite boutique representation firm to the most powerful football and marketing agency in the industry. The Athletes First brand has also become synonymous with family, loyalty and giving back to the community. Athletes First has negotiated an industry-leading \$15.7 billion in total football contracts, including nine contracts that have held the title of the largest in NFL history, as well as 12 record-breaking quarterback contracts. Murphy is dedicated to Athletes First's continued growth while preserving its legendary family-oriented culture. He also recently brokered a partnership with venture capital firms Mosaic and General Catalyst, providing the resources and expertise necessary to redefine the traditional continuum of representation services.

**AURA, Newport Beach***Brandon Kordower, Founder & CEO*

AURA provides marketing agencies financial reporting and guidance well beyond the industry norm. They translate financial data into a meaningful executive summary that drives profitability, as well as address areas of concern. Third party recipients of the financial statements, such as banks, have peace of mind that the reporting they're receiving is clean and accurate, making it a much smoother exercise to receive loans and credit lines, outside investment, or successfully exit the business through a due diligence process. While AURA provides significant strategic value, it also comes at a considerable cost savings relative to a comparably-skilled employee. AURA has 18 employees and serves over 75 clients nationwide, many based in Orange County.

**Austin Taylor Inc., Irvine***Ron Viggiano, President*

With over 35 years of experience Ron Viggiano has become the area's premier clothier by asking the right questions and understanding the clients wants and needs to help guide them into creating distinctive and personalized wardrobes. Using creativity and contemporary styling details he has built a loyal following of successful business leaders in Orange County.

**Avid Bioservices, Tustin***Nicholas Green, President & CEO*

Nicholas Green started his career in the UK working for the family business which was one of the first small molecule CDMO's, before it was sold in 1988 and ultimately became part of BTP Plc. Following the sale of BTP to Clariant, he moved to the US to head Clariant's Life Science division in the USA. Prior to coming to Avid in 2000 during COVID, Green had held leadership positions with a number of companies, which included, president & CEO of Rhodia's Pharmaceutical division and president of Codexis, pharma division. Throughout his career, Green oversaw manufacturing facilities around the world, which includes the UK, USA, Canada, France, Germany, Brazil, India, Thailand and China. Few things, however, have given Green as much enjoyment as living in Orange County and the achievements the Avid team has made over the past five years.

**Beyond Fifteen Communications Inc., Irvine***Lauren Ellermeyer, Co-Founder & President*

As the co-founder and president of Beyond Fifteen Communications, a dynamic marketing agency, Lauren Ellermeyer, is renowned for her prowess in cultivating and expanding robust agency partnerships. Serving as the driving force behind the agency's groundbreaking new business ventures, Ellermeyer seamlessly merges strategic vision with hands-on leadership. Ellermeyer's approach to agency partnerships, coupled with a keen eye for emerging talent and expertise in public relations and social media, has been instrumental in propelling Beyond Fifteen from its startup roots to a nationally acclaimed powerhouse. Her visionary implementation of entrepreneurial ideas, combined with results-driven strategies, has redefined the traditional agency-client relationship, setting a new standard for excellence in the industry. Today, Beyond Fifteen boasts a team spanning the U.S. and caters to a diverse range of clients, encompassing healthcare, technology, consumer packaged goods, energy, education, and more. Lauren Ellermeyer's leadership has not only shaped the agency's trajectory but has also positioned Beyond Fifteen as a trailblazer in the competitive landscape, committed to driving success for businesses across the spectrum.

**BioPhotas Inc., Tustin***Patrick Johnson, Founder, Chief Innovation Officer & Executive Chairman of the Board*

Patrick Johnson is the founder, executive chairman and chief innovation officer of BioPhotas Inc., as well as the inventor of the award-winning Celluma SERIES of light therapy devices. With an extensive background in the medical device industry, Johnson saw the potential for bringing the significant therapeutic benefits of Low-Level Light Therapy affordably to the masses, leading to the founding of BioPhotas and the development of 18 different Celluma devices so far. Johnson's innovation is responsible for more patents, more awards and more medical indications-for-use than any other low-level light therapy device in the world. Prior to founding BioPhotas, Johnson served as the executive director of the World Bed Project, a humanitarian organization formed to provide emergency relief to those left homeless by the 2010 earthquake in Haiti. His leadership experience includes 10 years with Pro-Dex, Inc., a publicly held medical device manufacturer, serving in the roles of chief business development officer, CEO and president, and Board Member. Johnson has worked his entire career in Orange County, leading several early-stage, turn-around and mature manufacturing companies.

**Blue C, Costa Mesa***Jeff Bentley, Chief Creative Officer*

Jeff Bentley is the chief creative officer at Blue C, a leading creative marketing agency recognized for its innovative strategies and impactful campaigns. With a passion for creative development, Bentley has been celebrated as the Creative Director of the Year by the Orange County chapter of the American Advertising Federation, a testament to his exceptional talent and leadership in the advertising industry. As the visionary architect behind the BrandPwr framework, Bentley has redefined how businesses approach marketing and branding. This strategic system aligns brand and marketing strategies into a cohesive framework, ensuring clients achieve consistent and measurable results. His ability to translate complex brand visions into actionable, engaging campaigns has made him a sought-after leader in the marketing world. Under Bentley's guidance, Blue C continues to push creative boundaries, helping brands connect with their audiences in meaningful and memorable ways. His commitment to innovation and excellence defines his approach to creative leadership.



AMERICAN CRYPTO COUNSEL: NAVIGATING THE NEXT ERA OF DIGITAL ASSETS

BY: **MOISH E. PELTZ, ESQ.**
& **KYLE M. LAWRENCE, ESQ.**



The Dawn of a New Crypto Era in America

With the recent election and change in US administration, the United States is experiencing a transformative shift in its approach to cryptocurrency and blockchain technology. Recent developments have ushered in a period of unprecedented opportunity for crypto entrepreneurs and businesses. Our law firm, with its leading Digital Assets Practice Group, is uniquely positioned to guide you through this evolving landscape, offering "Made in America" legal solutions tailored to the blockchain industry.

Trump's Memecoin: A Watershed Moment

On January 17, 2025, in a groundbreaking move that underscores the changing tides, then President-elect Trump launched his official memecoin (\$TRUMP). Over its first weekend, the memecoin gained billions of dollars in value. This unprecedented action by someone only days away from being inaugurated as president not only signals a dramatic shift in the government's stance on cryptocurrencies but also highlights the growing mainstream acceptance of digital assets. The launch of a presidential memecoin sets a new precedent and potentially paves the way for increased adoption and integration of blockchain technology in various sectors.

SEC's Crypto Task Force: Redefining Regulatory Approaches

Another mark of this new era is the resignation of Gary Gensler as SEC Chair, the appointment of Commissioner Mark Uyeda as Acting Chairman, and the launch of the SEC's crypto task force dedicated to developing a comprehensive and clear regulatory framework for crypto assets. Acting Chairman Uyeda appointed Commissioner Hester Peirce to lead the SEC's newly formed crypto task force, which marks a significant milestone in its own right. Uyeda and Peirce's leadership and focus on a sound regulatory approach for crypto in the US promises a more balanced and nuanced approach to crypto regulation. This task force is expected to focus on:

- ▶ Developing clear guidelines for crypto businesses
- ▶ Creating realistic paths to compliance
- ▶ Fostering innovation while protecting investors
- ▶ Addressing the unique challenges posed by decentralized finance (DeFi)
- ▶ Exploring the potential of blockchain technology in traditional financial markets

Optimism Amidst Regulatory Evolution

While the regulatory environment continues to evolve, recent political changes have injected a new sense of optimism into the crypto industry. The formation of the SEC's Crypto Task Force, coupled with the administration's pro-crypto stance, suggests a future where innovation and regulation can coexist harmoniously. Moreover, all of this innovation can now happen in the US. This shift creates a more favorable

climate for:

- ▶ Blockchain startups and entrepreneurs
- ▶ Established companies looking to integrate blockchain solutions
- ▶ Institutional investors exploring digital asset opportunities
- ▶ International blockchain businesses considering U.S. expansion

Made in America: Leveraging Domestic Legal Expertise

As the United States positions itself to become a global leader in blockchain innovation, our firm's "Made in America" legal offerings are more crucial than ever. We combine deep industry knowledge with a nuanced understanding of the evolving regulatory landscape to provide unparalleled guidance. Our expertise spans:

- ▶ Federal and state cryptocurrency regulations
- ▶ Securities law implications for token offerings, memecoins, NFT offerings, and other digital assets
- ▶ Tax implications of cryptocurrency businesses, transactions and holdings
- ▶ Litigation and asset recovery

Comprehensive Legal Services for the Blockchain Industry

Our digital assets practice group offers a wide range of services tailored to the unique needs of the crypto and blockchain sector:

- ▶ Regulatory Compliance Guidance
- ▶ Navigate complex federal and state regulations
- ▶ Develop compliance programs tailored to your business model
- ▶ Stay ahead of regulatory changes and adapt strategies accordingly

Token Offering Structuring and Support

- ▶ Compliant token offerings
- ▶ Navigate securities law implications
- ▶ Develop investor agreements and disclosure documents

Intellectual Property Protection

- ▶ IP licensing agreements
- ▶ Trademark protection for crypto brands and logos
- ▶ Copyright strategies for blockchain-related software and content

Corporate Structuring for Crypto Startups

- ▶ Formation of crypto-friendly business entities

- ▶ Structuring of decentralized autonomous organizations (DAOs)
- ▶ Governance frameworks for blockchain projects

Capital Raising and Venture Technology

- ▶ Assisting with early stage financing
- ▶ Conducting private placements for additional capital
- ▶ Preparing all documents in connection with seed rounds

Regulatory Advocacy and Government Relations

- ▶ Represent client interests before regulatory bodies
- ▶ Participate in policy discussions and public consultations
- ▶ Advocate for balanced and innovation-friendly regulations

Mergers and Acquisitions in the Crypto Space

- ▶ Due diligence for crypto-related M&A transactions
- ▶ Structuring deals involving digital assets
- ▶ Navigating regulatory hurdles in crypto company acquisitions

Dispute Resolution and Litigation

- ▶ Represent clients in crypto-related disputes
- ▶ Navigate jurisdictional challenges in blockchain litigation
- ▶ Develop strategies for smart contract disputes

Crypto Estate Planning

- ▶ Creating comprehensive digital asset specific estate plans that account for self-custodial private keys and cryptocurrency wallets
- ▶ Strategic use of gifting strategies to capitalize on current estate tax exemptions, including capitalizing on gift exclusions and lifetime gifting
- ▶ Moving digital assets into LLCs and establishing cryptocurrency asset protection trusts

Seizing the Moment: Your Partner in Blockchain Innovation

The crypto industry stands at a pivotal juncture, with unprecedented opportunities on the horizon. While challenges remain, the path forward is clearer and more promising than ever before. Our firm is committed to helping you navigate this new frontier, ensuring your blockchain ventures are not just compliant, but positioned for success in this rapidly evolving landscape.

There are significant risks inherent in any blockchain venture. Partner with FRB's blockchain lawyers to turn regulatory challenges into competitive advantages and bring your blockchain innovations to life in America's new crypto-friendly environment. With our deep expertise and forward-thinking approach, we're ready to help you write the next chapter in the American blockchain success story. Contact us at 949-333-8152.



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2025 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

Blue C Creative Marketing Agency, Costa Mesa*Eric Morley, CEO*

Eric Morley is the CEO and co-founder of Blue C, a dynamic creative marketing agency renowned for its innovative approach to branding and marketing. Under Morley's leadership, Blue C has established itself as a trusted partner for clients across diverse industries, consistently delivering measurable results and elevating brands to new heights. Morley is the visionary behind Blue C's proprietary BrandPWR framework, a strategic system that seamlessly integrates brand and marketing strategies to help clients stand out in competitive markets. His ability to craft and execute forward-thinking marketing plans has been instrumental in the agency's success, earning Blue C a reputation for creative excellence and strategic insight. Throughout his career, he has championed collaboration and innovation, ensuring Blue C's clients benefit from cutting-edge solutions tailored to their unique goals. His commitment to driving impactful results has solidified his role as a leader in the marketing world, inspiring both his team and the brands he serves to achieve exceptional success.

**Blue Sands Wealth, Irvine***Letitia Berbaum, Founder & Wealth Advisor*

Letitia Berbaum founded Blue Sands Wealth to offer a tranquil, trustworthy, focused and decisive approach to growing and safeguarding wealth. While money doesn't buy a beautiful life, structured with intention, it can afford individuals the time and freedom to enjoy it. Rooted in long-term relationships, Berbaum's leadership empowers clients to make informed financial decisions that align with their aspirations. The firm works with individuals, families, widows, women who are growing their wealth independently, and business owners who are curating exit plans. Berbaum's areas of specialty in wealth management include asset transfer strategies for high-net-worth individuals and multi-generational families, full-service strategic planning for business owners, and financial planning for women in business. Through her signature approach, Berbaum enables clients to confidently make pivotal choices that ensure their financial plans provide them with the security, support, and freedom they desire. Berbaum's expertise has been featured by Forbes Business Council, and she is a part of the Brea Chamber of Commerce Women in Leadership Council. She was also recognized as a "Women of Achievement" by Senator Bob Archuleta.

**BoozDNA Technology, Irvine***Hima Nippuleti, Founder, President & CEO*

Hima Nippuleti is the visionary founder and president of BoozDNA.com, an IT consulting firm recognized for delivering transformative solutions that align technology with strategic goals. A high-skilled immigrant, Nippuleti combines her professional expertise with a deep commitment to the socio-economic upliftment of her community. Under her leadership, BoozDNA has become a trusted, certified woman-owned and DBE-certified enterprise, empowering organizations while championing diversity and inclusion. With over 16 years of experience in IT strategy and project management, Nippuleti continues to drive impactful change, fostering innovation and creating opportunities for growth across industries.

**Braver Players Musical Theater Foundation, Costa Mesa***Chelsea Braverman, Artistic Director*

Braver Players started as a place to house aspiring teen artists who loved performing. Being from an educational background, Chelsea Braverman felt there was a need to form a place where teens could escape from their lives and work on team building, intrapersonal growth, and confidence while learning theater skills. They eventually grew not only into a musical theater space but also a short film school and a place for dance and acting classes. The foundation also services six elementary schools in Orange County by mounting their school plays. What sets Braverman apart from others that are in the field of directing and producing for teens and kids theater is her educational background. She has a master's in education so all the productions are structured like a class. They delve into story, character, background, and are constantly reflecting on what they are learning.

**Brewery X, Anaheim***Clayton Wellbank, CEO*

Clayton Wellbank grew Brewery X from zero employees to 250+ and from \$0 revenue to over \$25 million. The brewery has locations at the Honda Center, Angels Stadium, Harbor Island Restaurant, Ontario restaurant, and a distribution network through California, Colorado, Arizona, Massachusetts, and export to Japan.

**bridgED manufacturing, Anaheim***Karen Caswelch, Co-Founder & CEO*

Karen Caswelch is CEO of bridgED manufacturing and COO of Archytas Automation. Previously, Caswelch was CEO or COO at various startups after leaving a successful automotive career at General Motors in operations where she improved incoming supplier quality by 97% at Allison Transmission and was a part of the leadership team that sold Allison to private equity for over \$5.5 billion. She successfully raised over \$800,000 in seed funding, graduated from the inaugural Techstars Starburst Space Accelerator cohort and finalized contracts with multiple \$100 billion+ Enterprises. While at Full Spectrum Laser, she led company through 46% revenue growth while decreasing personnel turnover by 50%. Caswelch has an MBA from Harvard and a BS in Mechanical Engineering from MIT. She served on the Indianapolis Airport Authority Board and is the independent board member for CanvasGFX and a member of the Orange County Workforce Development Board.

**Broco Rankin, Ladera Ranch***Sterling Peloso, CEO*

Sterling Peloso lives in Rancho Mission Viejo and has built businesses both in Orange County and the Inland Empire. Broco Rankin has six divisions: underwater cutting, tactical cutting for military and police, manual hand tools, industrial tools, brazen rods for oil & gas, hard facing wire, GSA boxes.

**C.W. Driver, Anaheim***Brett Perkins, Director & Managing Partner*

Brett Perkins is a visionary entrepreneur whose determination and innovative approach have shaped an extraordinary career in construction, real estate development, and philanthropy. During his tenure with C.W. Driver, one of California's premier construction firms, Perkins led complex commercial and institutional projects, earning a reputation for delivering excellence and fostering high-performing teams. As the managing partner of Perk Development and Boomtown Partners, Perkins has spearheaded transformative projects, including Gravel Point Resort, a \$376 million luxury hotel on the Oregon Coast, and successfully raised \$240 million in capital for a convention center hotel. These ambitious undertakings highlight his ability to bring big ideas to life, blending functionality with aesthetic appeal while driving regional economic growth. Perkins's impact extends beyond business. As founder and president of Gravel Point Foundation, a newly formed non-profit, he champions alternative approaches to community service, creating meaningful, lasting change for under-served people.

**Community Catalyst, Dana Point***Amber Gregg, CEO & Founder*

Amber Gregg is the visionary CEO and founder of Community Catalyst, a boutique Planning and Entitlement Firm committed to shaping vibrant, sustainable communities. With over 20 years of experience in municipal planning, Gregg launched Community Catalyst in 2018 to deliver innovative solutions that improve quality of life. Specializing in coastal development, housing, historic preservation, and local legislation, the firm has become a trusted partner to cities like Laguna Niguel, Laguna Beach, Orange, Aliso Viejo, Westminster, Costa Mesa, and most recently the OCCOG. Operating remotely, Community Catalyst blends flexibility with exceptional service. Gregg's passion for leadership and mentorship shines through her work. In 2022, she co-chaired the California American Planning Association (CA-APA) State Conference in Anaheim, showcasing Orange County's planning achievements. She also actively mentors aspiring planners and collaborates with UC Irvine's Master of Urban and Regional Planning (MURP) program including helping to establish a formal internship initiative. Gregg believes in empowering planners and community members to drive meaningful change—a philosophy at the heart of Community Catalyst.

**Conquer Financial, Brea***Guillermo Haro, Sr Executive Vice Chairman*

Guillermo Haro founded Conquer Financial in 1999 and is recognized as a Top Latino in WFG/AEGON USA. He has over 25 years of financial experience.

**Craft, Trabuco Canyon***Angelo Ponzi, Founder, Fractional CMO*

Angelo Ponzi has over 25 years of business experience in sales, marketing, branding, strategic planning, and market research. His senior-level expertise includes developing and directing comprehensive market/product plans, market assessments, branding and communications plans, and strategic business planning for various business-to-business, financial, consumer products, medical, package goods, general retail, restaurants, and high-tech clients. He has led both small and large teams at global, national, regional, and start-up companies, as well as worked with products in all stages of their lifecycle, from inception to implementation. Previous positions have been on both the client and advertising agency sides of the business giving him a unique understanding of his client's business operations, sales, marketing and communications needs. Prior to founding Craft, he launched Strategic Market Intelligence, a branding and market research firm, which became the foundation for Craft.

**CSUF Center for Entrepreneurship, Fullerton***John Bradley Jackson, Director*

John Bradley Jackson, affectionately known as "Professor JJ," is the director of the Center for Entrepreneurship at California State University, Fullerton. His journey, marked by Silicon Valley innovation and Wall Street wisdom, has shaped the Center into a beacon of excellence. In 2016, Jackson founded the CSUF Startup Incubator, a groundbreaking venture that has launched over 100 startups, demonstrating his commitment to nurturing entrepreneurial talent. The incubator guides startups as they test and launch their business concepts. Jackson recently received a \$550,000 grant from the state of California to support the center's social entrepreneurship services in Orange County, focusing on expanding the CSUF Startup Incubator to include more social enterprise startups, online education, and curriculum to embrace social impact. In 2016 Jackson founded Titan Angels, LLC, a seed investment fund that focuses on scalable ventures in the Southern California region. Jackson serves as fund manager. He later founded Titan Angels II, LLC which also invests in scalable startups. In 2022 Jackson founded The Youth Development Fund, LLC which is devoted to global EdTech investments.

**DemandSkill, Irvine***Amy Winchell, Managing Director*

Amy Bartulis Winchell is an award-winning industry veteran and the managing director of DemandSkill, a globally-focused, highly strategic team launched with private angel funding.



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With over 30 years of experience in sales leadership, she has held senior roles at INFUSEMedia, The Register / The Next Platform, IDG, 1105 Media, UBM Channel, and HPCWire, among others. Winchell is a proven sales leader with expertise in digital strategy, SEO, market research, and management. A proud Baylor University graduate, she is passionate about helping businesses grow revenue and achieve their goals. Winchell's own accolades include a nomination for LA Times B2B Publishing's 2024 Orange County Inspirational Women Forum and Leadership Awards. Her dedication to innovation and excellence defines her career, making her a trusted leader in driving strategic growth and innovation across industries.

**Ducere Global Business School, Newport Beach**

Mat Jacobson, CEO

Mathew Jacobson is the founder and president of Ducere Global Business School and Kennedy University of Leadership, as well as the Ducere Foundation. With a vision to provide accessible, career-focused education, Jacobson has revolutionized higher education through innovative partnerships with global leaders, including Presidents, Prime Ministers, and Nobel Laureates. Ducere delivers applied MBA programs in collaboration with institutions like Collège de Paris and Rome Business School, focusing on industry-relevant skills. Under his leadership, Ducere's initiatives fund the Ducere Foundation, which supports education programs in 28 African nations, improving testing standards and preserving cultural traditions through storytelling. At Kennedy University, Jacobson pioneers graduate leadership programs tailored to enterprise needs. Previously, Jacobson founded Origin Human Resources, providing leading vocational training solutions, and MindAtlas, specializing in e-learning for multinational corporations. A recipient of multiple awards, including Education Executive of the Year, Mat continues to shape global education through innovation and philanthropy.

**Ecotrak, Irvine**

Matt Singer, CEO

2024 was a big year—Matt Singer raised \$30 million to supercharge Ecotrak's growth. With 40,000+ users and big-name clients like Flynn Group, Dutch Bros and Dave & Buster's, Ecotrak is helping businesses save money and make smarter decisions. Singer's mission is smarter tools, better decisions, and driving real results. Singer was hired as CFO in 2018, promoted to CEO in 2021 and was doing such a good job growing sales & topline in the CFO Chair. Revenue growth has been 55% Year over year growth since he took over CEO, employee base is up 30-50% every year since he took over CEO.

**EPD Solutions Inc., Irvine**

Jeremy Krout, CEO

Jeremy Krout is the founder of EPD Solutions Inc., and has over 20 years of experience in urban, environmental and policy planning; project management; and real estate entitlement and development, in both the public and private sectors. Over this period, he has successfully managed many regionally significant and complex projects in these fields, which drew on his knowledge of federal, state and local government regulations, natural interpersonal and negotiation skills, public presentation strengths, detail-oriented approach to project design oversight, and team leadership abilities. His wide-ranging and multifaceted experience on infill residential, master-planned communities, affordable housing, education, public and private redevelopment, transportation, mining, solar, recreation, hospitality and industrial projects has developed and honed his skills in entitlement strategy and implementation and environmental compliance. It is because of his successes and dedication that he has earned the conviction and reliance of project proponents and opponents, stakeholders and his clients.

**European Spa Source, Costa Mesa**

Randy Carr, CEO & Founder

Randy Carr is the CEO and founder of European Spa Source, a leading brand specializing in luxury aromatherapy products. Under his leadership, the company has revolutionized how people experience wellness at home with its flagship product, Eucalyptus ShowerSpa Mist, crafted from 100% pharmaceutical-grade eucalyptus oil. Carr's vision combines innovation and quality, creating products that bring spa-like relaxation to everyday routines. With a background in entrepreneurship and a passion for health and wellness, Carr has built European Spa Source into a trusted name celebrated for its commitment to excellence and sustainability. His leadership emphasizes customer satisfaction, ensuring each product delivers a transformative and luxurious experience. Carr is not only a successful business leader but also a wellness advocate. He dedicates his career to enhancing lives through simple yet effective aromatherapy solutions. Through his work, he has positioned European Spa Source as a pioneer in the health and wellness market, empowering customers to prioritize self-care and relaxation.

**Evolution Swim Academy, Mission Viejo**

Felipe Delgado, Founder

Felipe Delgado is a two-time Olympic Swimmer (1996 & 2000), Olympic Coach (2020), and founder of Evolution Swim Academy, which has grown to provide swim instructions to thousands of students in Orange County. Since founding Evolution Swim Academy in 2005, Delgado has successfully grown his company from what was once a part-time, seasonal instruction course to what now includes multiple state-of-the-art indoor swimming locations in Orange County, providing 50 weeks of certified swim instructions centered on a safety-focused curriculum that builds life-savings skills for children three months and up. Delgado is the founder of the Swim Stars teaching methodology, and currently serves as the president of Evolution Swim Academy, Inc., the managing partner for both Evolution Swim Academy Mission Viejo and Evolution Swim Academy Rancho Mission Viejo, and the Team Director of Evolution Racing Club.

**Finfare, Irvine**

Wayne Lin, CEO

Wayne Lin, the visionary founder and CEO of Finfare, embarked on his entrepreneurial journey with a mission to solve critical challenges for small businesses. As a Taiwanese immigrant, Lin began his journey in the U.S. with little more than ambition and determination. Despite the challenges, he achieved remarkable success. In his 30s he sold his company which allowed him to refocus his efforts on Finfare when the time came. Fast forward several years and today Finfare is a modern expense management platform that leverages cutting-edge AI technology for all types of businesses.

**FirstElement Fuel Inc., Irvine**

Joel Ewanick, Founder & Executive Chairman of the Board

Joel Ewanick is executive chairman of the Board of Directors at FirstElement Fuel where he is responsible for helping to steer and implement FirstElement's vision by partnering with the chief executive officer and Board of Directors. As a founder of FirstElement and its previous chief executive officer, Mr. Ewanick was led FirstElement to become the largest hydrogen vehicle refueling company in the world. He brings vast experience and skills in marketing, improving the customer experience, growing markets, and managing customer incentive programs. Mr. Ewanick previously served as General Motors' vice president and global chief marketing officer and vice president of marketing at Hyundai Motors America. At Hyundai, he was critical to the auto's market growth and was named Forbes chief marketing officer of the Year and BrandWeek's grand marketer of the Year. He's most recognized for a relentless drive, willingness to make bold changes that benefited the brand, and for the ability to forge mutual trust and respect between company and consumer.

**Foster Love, Brea**

Danny Mendoza, CEO

Danny Mendoza is the founder, CEO, and board chair of Foster Love, a transformative nonprofit dedicated to improving the lives of foster youth nationwide. Since its founding in 2008, Foster Love has grown into one of the largest volunteer engagement organizations in the United States, positively impacting over 155,000 foster youth annually. Under Mendoza's visionary leadership, the organization has developed innovative programs like the Family Fellowship scholarship program, which provides transition-age foster youth with comprehensive support to achieve educational and professional success. Mendoza also founded Techether, a groundbreaking company leveraging technology to enhance support for foster youth. Its Ella software, adopted by dozens of government agencies, ensures foster youth have digital records of their milestones and achievements, setting a new standard for care. Through his leadership, Foster Love recently celebrated serving its one-millionth child, marking a significant milestone. Mendoza's passion, innovation, and dedication to creating systemic change have made him a pioneering leader in his field and a powerful advocate for vulnerable youth.

**FullTerra (Advanced Construction/Applied GeoKinetics), Irvine**

Brian Kramer, CEO

Through FullTerra's family of companies, they offer design-to-build-to-monitoring solutions to protect against dangerous soil conditions and keep people healthy. They're a national leader in environmental mitigation, unlocking new opportunities for developers nationwide to build more and welcome individuals to safer spaces. GeoKinetics is an environmental and geotechnical firm headquartered in Irvine, California. During Brian Kramer's time as CEO they have grown from 60 to 150 employees and shareholder value has gone up dramatically.

**Gatekeeper Systems, Lake Forest**

Robert Harling, CEO

Robert Harling brings over 20 years of experience driving innovation and growth in the retail loss prevention industry. As CEO of Gatekeeper Systems, a leading provider of tech-enabled loss prevention solutions, Harling oversees technology development, business strategy, commercial success, and financial growth - directing the company's mission to protect retail associates, keep retail merchandise and assets secure, while enhancing profits for retailers around the globe. Prior to joining Gatekeeper Systems, Harling served as CEO of Cartronics, where he helped establish the market for pushout theft solutions. In 2017, Cartronics was acquired by Gatekeeper Systems and in 2018, Harling was named CEO of the newly combined company. Under his leadership, Gatekeeper continues to develop innovative technologies that protect retail associates, stop theft, and drive measurable results for retailers worldwide. An executive with a proven track record leading, building, and transforming global businesses through turnarounds, M&A, technology development, market creation, and rapid growth. Harling has extensive operating leadership experience across multiple industries including loss prevention, IoT and M2M, wireless communications, high-speed data storage, edge computing, industrial and defense, semiconductor, and consumer products.

**Genesis Bank, Newport Beach**

Amilcar "Amil" Aaron, Head of Genesis Bank Institute of Entrepreneurship, Head of Community Impact

Amil Aaron is the senior vice president, head of community impact at Genesis Bank, where he leads transformative initiatives to empower diverse entrepreneurial dreams and accelerate economic growth. He spearheads the Genesis Bank Institute for Entrepreneurship (GBIE), a business advisory and incubator division dedicated to supporting small to midsize, family-owned, and minority-owned businesses in Southern California. Under his leadership, GBIE has become a center of influence, aggregating resources, expertise, and educational initiatives to break down barriers to financial success and deliver on Genesis Bank's Minority Depository Institution (MDI) and Diversity, Equity, and Inclusion (DEI) commitments. In addition, Aaron serves as president and executive director of the Genesis for Good



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Foundation, advancing opportunities to create thriving and inclusive communities. He is also the founding chairperson of the City of Irvine's Diversity, Equity, and Inclusion Committee, where he has led critical initiatives to establish lasting equity within the city. Aaron's innovative leadership reflects his commitment to driving economic growth and community transformation.

Greenfield and Associates LLP, Huntington Beach

Bao Luong, Managing Partner

At Greenfield & Associates, improving the well-being of employees is as important as delivering exceptional client service. Bao Luong has spearheaded several initiatives to create a supportive and growth-oriented workplace, including: Professional Development Programs: Investing in employee education has been a priority. The company offers ongoing training in the latest accounting practices, software, and compliance standards. This not only enhances employee skills but also fosters a culture of continuous learning and improvement. Flexible Work Environment: Understanding the importance of work-life balance, Bao Luong has implemented flexible working hours and remote work options. These changes have increased employee satisfaction, reduced burnout, and created a more positive work atmosphere. Employee Wellness Initiatives: The company offers wellness programs, including financial planning workshops, health benefits, and stress-management resources. These initiatives have contributed to lower turnover and higher productivity, as employees feel valued and supported. Inclusive Culture: Diversity and inclusion are cornerstones of Greenfield & Associates' culture. Bao Luong has championed policies that promote a diverse and inclusive workforce, ensuring equal opportunities for all employees. This has cultivated an environment where creativity and collaboration thrive.

**HUDDL3, Tustin**

Dane Groeneveld, CEO

Dane Groeneveld has grown the business times four, with six major metro offices. Over the course of six years they have purchased four companies. Groeneveld is building out The Future of Teamwork a Podcast that has gained national recognition.

**HVN Development LLC, Irvine**

Tommy Beadel, Founder & CEO

Tommy Beadel is the visionary founder and chairman of Thomas James Homes and most currently the founder and CEO of HVN Development, a real estate development firm focused on delivering exceptional quality, innovation and social impact. With over two decades of experience in the industry, Beadel's entrepreneurial journey exemplifies resilience, creativity, and a relentless commitment to excellence. Beadel is working to transform California's housing landscape by leading HVN Development, a company devoted to addressing one of the region's most pressing challenges: affordable housing. Under his vision, HVN Development has pioneered innovative solutions, creating thoughtfully designed homes that combine affordability, comfort, and community. The company specializes in crafting one- and two-bedroom residences that maximize space and modern amenities, offering a haven for residents in vibrant neighborhoods across the state. Through collaborative partnerships with municipalities and privately funded stakeholders, Beadel has raised over \$100 million in just thirteen months and is building projects that reflect HVN's mission to increase California's affordable housing supply while fostering growth and well-being.

**IBEC Inc., Newport Beach**

Bardia Vahidi, Ph.D., Founder & CEO

Dr. Bardia Vahidi's company, IBEC Inc., has worked with over 800 organizations helping them achieve critical management systems certifications. These companies range from small to Fortune 500 in oil and gas, petrochemical, power and energy, construction, food, medical, pharmaceutical, manufacturing, and recycling industries. Dr. Vahidi's work helps improve organizations by providing professional Management Systems consultancy, auditing and training. With over 25 years of consulting and auditing experience, he leads IBEC's business direction and development. Dr. Bardia Vahidi's has actioned his passion for building a better world by helping businesses embrace best practices and achieve their goals for becoming compliant with various standards. Dr. Vahidi builds personal relationships, gives his personal time to mentor young engineers, compliance and quality control professionals, guiding them to chart their professional growth. With his advanced degrees, Dr. Vahidi brings systems and design thinking to everything he does, and he actively spreads the knowledge helping others embrace the same approach.

**Idea Hall, Costa Mesa**

Rebecca Hall, President & CEO

Rebecca Hall founded and leads Idea Hall, a nationally recognized creative communications agency committed to championing good both at home in Orange County and nationwide through an integrated marketing model that brings marketing, branding, public relations and advertising services together under one roof. Hall and her team have worked with some of OC's most established commercial real estate businesses, as well as non-profits taking on some of the county's biggest issues - including workforce development and mental health. The agency has also attracted top local talent through its strong corporate culture where people come first. For over two decades, Rebecca Hall has earned the reputation of being one of the first and most successful female entrepreneurs in the county. She attributes her success to staying ahead, constantly innovating and maintaining strong relationships.

**Innovative Construction Solutions, Costa Mesa**

Hirad Emadi P.E., President & Co-Founder

Mr. Hirad Emadi, P.E. attended the University of California in Irvine (UCI) where he earned his Bachelor of Science in Civil Engineering in 1993. He obtained his California Professional Engineering license in 1997. Mr. Emadi started his career at an environmental engineering firm before he co-founded Innovative Construction Solutions (ICS) in 1999 and has served as its president since. With 25 years leading ICS, Mr. Emadi has



successfully grown the business organically into a \$100 million+ environmental construction company with multiple office locations in California and one in Washington State. ICS has been recognized by Engineering News and Record (ENR) as a global Top 200 Environmental Firm for 10 consecutive years. Today, ICS self-performs a diverse list of environmental construction services allowing it to be a one-stop shop implementing solutions to environmental challenges in soil, vapor, air and water

Jan's Health Bar, Huntington Beach

Poppy Holguin, Owner

In 2010, Poppy Holguin purchased the original Jan's Health Bar location in Huntington Beach. Applying her knowledge of business and marketing, she has since expanded the brand to four additional stores: Costa Mesa in 2013, Laguna Beach in 2015, Corona del Mar in 2017, and Irvine in 2021. In 2018, she renovated the brand's flagship location, expanding it from 800 square feet to 2000 square feet. In 2022, the brand celebrated 50 years in Orange County. The brand has since expanded to open a second location in Huntington Beach and a location in Long Beach. Jan's Health Bar is poised for future growth along the coast Holguin eyes expansion into Los Angeles and San Diego.

**Kei Concepts, Fountain Valley**

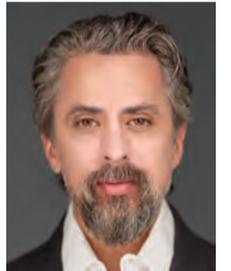
Viet Nguyen, Founder, CEO, & Executive Chef

Helmed by Viet Nguyen, Kei Concepts is a trailblazing culinary group based in Little Saigon, Orange County, recognized for restaurants such as Súp Noodle Bar, Vox Kitchen, Nep Café, Kin Izakaya, INI Ristorante, and ROL Hand Roll Bar, among others. These unique eateries combine technology and artistry to craft unparalleled dining experiences. With a mission that extends beyond culinary excellence, Kei Concepts fosters a vibrant community, champions startups, and promotes arts, all through the unifying power of pan-Asian cuisine. As the group's founder, CEO, and executive chef, Nguyen is passionate about connecting diverse communities through the universal language of food - an ethos evident across all his concepts. Nguyen sees each restaurant as a canvas for this mission, where the culinary creations are not just dishes but cultural ambassadors.

**LEHR, Anaheim**

Daniel Hamm, CEO

Daniel Hamm is the current CEO of Lehr-Police Fleet and Emergency Vehicle platform, one of the largest in the country. Corporate office in Newport Beach, with large location in Anaheim, throughout California, Nevada and Texas and soon to be the largest in the nation.

**Luxe Du Jour, Irvine**

Tammy Phan, CEO

Tammy Phan, CEO and founder of Luxe Du Jour, grew up with a dream of owning something luxurious despite the challenges of being a high school dropout from a humble, immigrant family. Determined to carve her own path and break from the traditional career molds, Phan turned her passion into a thriving business. Luxe Du Jour is now the first online platform where consumers can shop, sell, rent, and restore designer handbags and accessories-all in one place. Phan's journey from adversity to entrepreneurship reflects her relentless drive to redefine the luxury resale industry and make high-end fashion more accessible to everyone. Since founding Luxe Du Jour, she has launched innovative services such as Luxe Bag Spa and Luxe Bag Rental, making the resale experience more convenient and sustainable. Phan has grown Luxe Du Jour into a \$70 million company, employing a passionate team of young, diverse women. Through her work, she champions inclusivity, sustainability, and the belief that everyone deserves a bit of luxury. Phan's story is one of resilience, innovation, and paving a new path for future entrepreneurs.

**Managed Direct Response, Irvine**

Pat Mercuri, Founder & President

Pat Mercuri is the founder and president of Managed Direct Response one of the leading Direct Marketing and Lead Generation companies in Orange County. Mercuri is well recognized as a leader in the industry at the forefront of innovation in an ever evolving Marketing Landscape. During his career Mercuri has mailed over 250 million direct mail marketing pieces for his clients in the automotive, solar, mortgage and non-profit fields. Mercuri's success is based on his determined focus on delivering tailored, high-impact high ROI solutions for his clients. This is Mercuri's 11th nomination.

**MLG Attorneys at Law, Costa Mesa**

Jonathan Michaels, Principal

Jonathan Michaels has been in practice since 1995, and during that time has created an exemplary law firm. By challenging some of the largest companies in the world, Michaels has gained national recognition as the "go to" attorney for high stakes litigation, when everything is on the line. Michaels has developed a unique practice in the automotive industry, where he has litigated cases against nearly every major automotive manufacturer in the world. This includes cases against GM, Audi, Maserati, Mitsubishi, FCA, Kia, Nissan, Honda, AM General, Isuzu, Toyota, Hyundai, Harley-Davidson, Ford, Acura, Tesla, Volvo, Volkswagen, Aston Martin, Land Rover, Mercedes and Porsche.

**Mortenson Taggart Adams, Irvine**

Michael Mortenson, Managing Partner

Michael Mortenson is a founding partner of Mortenson Taggart Adams LLP. He is an experienced trial lawyer who represents and advises Fortune 500 companies, innovative startups, emerging middle-market companies, and high-profile individuals, as both plaintiffs and defendants, in complex, high-stakes matters in federal and state courts throughout the country. Mortenson's trial practice focuses primarily on business litigation, consumer litigation and employment litigation. He regularly handles matters involving fraud, breach of contract, breach of



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warranty, breach of fiduciary duty, misappropriation of trade secrets, products liability, whistleblower actions, discrimination, and retaliation for clients in various industries including automotive, technology, manufacturing, alternative energy, private equity and sports and entertainment. Mortenson's work has been featured in various media outlets including The Washington Post, ABC News, Los Angeles Times, Associated Press, Law360, and others. Mortenson was previously the Chair of Consumer Litigation at Stradling, Yocca, Carlson & Rauth, and a partner at Baker Hostetler LLP. Mortenson was named to the Best Lawyers in America (2024 Edition) and as a Southern California Super Lawyer since 2022.

Mountain Mike's Pizza/Juice It Up!, Irvine

Chris Britt & Ed St. Geme, Co-owners

Visionary leaders, savvy entrepreneurs and respected businessmen, Chris Britt and Ed St. Geme are co-owners of award-winning restaurant franchises Mountain Mike's Pizza and Juice It Up! Both brands have experienced tremendous growth and momentum during the duo's seven years of ownership. The Stanford graduates, longtime friends and investment professionals purchased Mountain Mike's Pizza in 2017. The acquisition of Juice It Up! followed a year later. Under their leadership, the Orange County-based brands have achieved record-setting sales and unprecedented unit growth. Mountain Mike's Pizza restaurants have grown by more than 70% to reach locations in 14 states across the country. Juice It Up! has grown total locations by 20%. As both brands celebrate significant milestones in 2025 - 300 units for Mountain Mike's Pizza and 30 years in business for Juice It Up! - the entrepreneurial owners are poised to lead these acclaimed brands into new eras marked by franchise expansion and increasing popularity among guests. Britt and St. Geme previously co-owned one of the largest franchise groups in the Burger King system with 43 restaurants.



Nutri-Win, Aliso Viejo

Ephraem Okechukwu, Founder

Growing up in Lagos, Nigeria, Ephraem Okechukwu struggled with severe malnutrition that stunted his growth and academic performance. His mother, Henriett Okechuku, a microbiologist, created a protein-rich cereal from indigenous grains as an affordable alternative to expensive imported brands. The cereal transformed his health within three months, enabling him to excel academically and eventually earn a scholarship to Soka University of America in Aliso Viejo, Calif. Inspired by Soka's mission to foster global citizens committed to change, Okechukwu co-founded Nutri-Win in 2023 to develop and scale his mother's formula. Under his leadership, the social enterprise has distributed over 2,000 meals, improving the lives of more than 200 children across West Africa. Through partnerships with NGOs like Caritas Nigeria and local governments, Nutri-Win delivers these life-changing meals while fostering community development. His mother's solution to his childhood malnutrition has become Okechukwu's mission to help others.



O Arch Inc., Irvine

Dickson Oi, CEO

Award winning architect, inventor, and passionate designer, Dickson Oi brings over 20 years of experience in commercial architecture, sustainable practices, and a reputation for client satisfaction. Oi has extensive experience in a wide range of commercial building typologies both in the public and private sectors. With over 2,500 successful projects in his track record, Oi is a trusted expert in the field. After practicing for 20 years as an employee Oi felt that he could reshape and disrupt the status quo of how architects execute projects and to provide better work experiences for clients. At the height of the pandemic, with the market filled with uncertainty, Oi decided to test his bold vision and launched his own firm, O Arch, Inc. O Arch is founded with his firm believer in quality customer service. Oi believes unapologetically in the client and team experience throughout the life of each project. With his customer centric approach he has earned the trust of many loyal clients building long lasting relationships.



Obagi, Irvine

Arash Khazei, President

Arash Khazei runs national and global sales meetings, managing 110 people in the sales organization throughout the globe. Obagi has been around for 30 years. sold to Valeant, then in 2017 sold to PE firm in China. in 2022 Waldencast bought the business and took it public via SPAC.



OC World, Santa Ana

Scott Hays, Executive Producer

Scott Hays is co-founder and executive producer of OC World, the county's only nonprofit multimedia company. OC World broadcasts to 15+ million households from Santa Barbara to San Diego on KLCS-PBS and on its own YouTube channel. OC World has produced more than 100 programs - including interviews with prominent Orange County leaders; field reports and documentary shorts on issues of significance to the Southern California region. Since its launch in 2022, OC World has been recognized with at the Golden Mike Awards and Los Angeles Television, Script & Film Festival. With a Masters' Degree in English Literature and Communications, Hays also teaches part-time at multiple community colleges. Before Launching OC World, he co-produced the PBS SoCal public affairs program Inside OC with Pulitzer Prize-winning journalist Rick Reiff. Over the course of his career, Hays has published roughly a dozen, mostly non-fiction books, and worked as an editor/freelance writer for a number of publishing companies.



Olukai/Archipelago Companies, Irvine

Dan McInerney, Founding Partner

Dan McInerney is a lifelong Orange County based entrepreneur. He started his career at



CONGRATS TO BRENT KULP

Congratulations to Brent Kulp, President and CEO of TraFFix Devices, Inc., on being nominated for the 2025 Excellence in Entrepreneurship Awards. Brent has been with TraFFix Devices, Inc., a San Clemente-headquartered traffic safety manufacturing company, since 1988. During that time, his leadership has been integral to the growth of the business, including developing numerous products for which he has been awarded patents. This nomination represents his unwavering commitment to the growth and continued success of the business.



2025 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

QuickSilver as one of their first 10 employees. He helped Build Quicksilver globally and became chief sales officer for the mens division and spearheaded Quicksilver France. When Dan left Quicksilver, the company had over \$2 billion in sales globally. McInerney started Olukai with two partners (Bill Worthington and Matt Till) in 2004/5. 20 Years later Olukai and the assorted brands that McInerney has drawn to the business (Melin, Roark, Kaenon, Etc.) is in 15 Countries, they have more than 2,500 retail locations and are over \$300 million in revenue.

ON ITS AXIS, Costa Mesa

Shelley Iocona, Founder

Shelley is the quintessential “woman in tech.” She is an innovator, mentor and advocate for the under-voiced. After an early career in engineering and product for several global tech leaders, Iocona transitioned into consulting where she has scaled a leading award-winning innovation firm that celebrates inclusive entrepreneurship.

Outshine Public Relations, Newport Beach

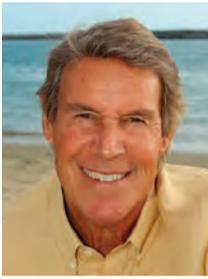
Talia Samuels, Founder & President

Named one of the “Best PR Agencies in America” by Forbes, Outshine Public Relations specializes in restaurant, hospitality, and culinary public relations. Founded by Talia Samuels in 2015, her agency represents an all-star roster including James Beard Award-winning and Michelin-starred chefs, celebrity restaurateurs, and new-to-market culinary brands. With deep roots in the hospitality industry, she has a passion for supporting hoteliers, restaurateurs, chefs, and food and beverage brands through her creative storytelling verticals. Recognized for her poise, tenacity, and integrity, Samuels is a force in her field. Her company, Outshine Public Relations, is a full-service agency providing public relations, social media management, photography, videography, and digital marketing.

PatientFi, Irvine

Todd Watts, CEO & Co-Founder

Todd Watts is the CEO & co-founder of PatientFi, a leading payments technology company that enhances patient access to healthcare through its financing and subscription point of sale platform. Under Watts' leadership, PatientFi has helped 320,000 patients get approved for over \$3 billion in medical procedure costs. Today, PatientFi operates across all 50 states with a partnership customer network of over 5,000 medical practices. PatientFi was recently ranked the 128th fastest-growing private company in the United States by Inc Magazine and ranked by Deloitte as the 54th fastest growing technology company in North America. In 2024, Watts was awarded the Ernst & Young Entrepreneur of the Year® Pacific Southwest Award, recognizing his leadership and dedication to making healthcare procedures more attainable for patients.

**Powerhouse+Co., Santa Ana**

Kristin Daher, Founder & CEO

Since founding Powerhouse+Co. in 2015, Kristin Daher has continually advanced its standing as one of Southern California's premier agencies. She has strategically reimagined the business' approach to PR, influencer and social media programs, leveraging innovation and thought leadership to allow client stories to shine. Led by Daher's vast professional network and the agency's best-in-class reputation, the company diversified its roster in 2024 with new clients in the venture capital and real estate industries, along with exciting brand work in the agency's specialty categories of franchise, technology, restaurant and CPG. Beyond her role in growing the agency, Daher has fostered a transformative culture defined by creativity, development and achievement. In many ways, she has molded Powerhouse in her own likeness. It's an upbeat, innovative, high-energy workplace where brainstorming yield equal parts productivity and laughs, unique personalities are always welcome and collaboration is ubiquitous. In nearly 10 years of leadership, Daher has led Powerhouse+Co. to achieve steady revenue growth and impressive client diversification, while providing a happy, healthy agency culture where employees thrive.

**PRP/ Two Masters, Santa Ana**

Donald Steiner, CEO

Donald Steiner founded Profit Recovery Partners in 1997 and currently serves as CEO. Since the firm's inception, Steiner has managed the growth of PRP and expanded its impressive base of clients to include FORTUNE 1,000 companies and an assortment of middle-market companies. He built the firm on core values centered around serving the client first and created a culture dedicated to achieving the impossible by finding a better way. PRP's accumulative savings for its clients have now surpassed \$10 billion. Before starting PRP, Steiner spent over a decade in the office equipment industry holding sales management and executive positions at FKM Copier Products where he was instrumental in growing revenue. Earlier, he worked for Canon in a variety of sales roles. Steiner is also the founder of the Two Masters Wine Club and Steiner Innovations as well as the maker of the infant sunshade “Sweet Baby Shade.” He holds a Bachelor of Arts degree from Loyola Marymount University and is a nine-year Board of Regents member. Steiner currently serves on the boards of the Emeril Lagasse Foundation, Keep Memory Alive (Cleveland Clinic Lou Ruvo Center for Brain Health), and OCSA (Orange County School of Arts).

**Quality Health Partners, Santa Ana**

Theresa Henry, CEO

Theresa Henry has been caring for patients, primarily in emergency medicine, as a Physician Assistant for over 20 years. She started Quality Health Partners after she worked with Primary Care Physicians doing quality improvement visits to help with quality performance. The rapport she builds with her PCP partners is built on trust and care. Their physician assistants and nurse practitioners are selected and trained by Henry and she places the right NP/PA in partner PCP practices after establishing the relationship with the physician. She is specially trained in



Smart Growth: Scaling Your Business for Long-Term Success

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Savvy entrepreneurs scale with intention, understanding that robust legal frameworks support sustainable growth. This is where a trusted legal partner becomes indispensable. At Adams Corporate Law, we work hand-in-hand with business leaders to establish resilient structures that secure your operations. Our approach not only helps your business to be in a better position to attract capital but also provides a competitive edge in future strategic dealings. Our expertise ensures that every phase of your expansion is both legally secure and strategically aligned with your vision, addressing nuanced challenges before they evolve into costly issues.

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M&A Attorney Addison Adams is the founder of Adams Corporate Law, a leading law firm specializing in a full range of corporate legal services for businesses, investors, and funds of all sizes—with a particular emphasis on mergers and acquisitions. We are the “lawyers who close deals.”



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2025 EXCELLENCE IN ENTREPRENEURSHIP AWARD NOMINEES

coding and documentation for Medicare Risk and is successful with her patients in getting them to be compliant in their treatment of chronic illnesses and in motivating them to stay up to date with their routine preventive care. Henry's leadership has been instrumental in driving the company's mission of delivering innovative healthcare solutions to communities across the region.

Rallio, Irvine

Chuck Goetschel, CEO

Rallio is a leading innovator in social media management, specializing in empowering multi-location and franchise businesses to thrive online. By integrating advanced AI technology, Rallio's platform streamlines content creation, scheduling, and engagement, enabling businesses to maintain a cohesive brand presence while leveraging localized customization. Rallio's AI-driven tools analyze trends, optimize posting strategies, and provide actionable insights, ensuring maximum impact with minimal effort. This approach not only simplifies social media management but also drives measurable growth by enhancing audience engagement and brand visibility. A notable achievement includes the launch of a travel-focused ecosystem, offering travel agents free AI-powered accounts to access ready-to-use content from top industry partners. This initiative exemplifies Rallio's commitment to innovation and community empowerment. With its blend of cutting-edge technology, user-friendly design, and tailored solutions, Rallio has become an indispensable partner for businesses looking to harness the power of AI to elevate their social media strategies.



Regal Court Reporting, Santa Ana

Stephanie Leslie, Co-Founder & Owner

Stephanie Leslie co-founded Regal Court Reporting in 2007, and she is proud that it remains one of the last 100% court reporter-owned, stenography firms in California. A champion for maintaining the integrity of the industry while recognizing the need for strategic and tactical evolution to take place, Leslie has served extensively on the California Deposition Reporters Association board as a District representative and is the current president. Investing in future generations through mentoring college students and new licensees, Leslie believes industry sustainability requires the collaboration of current and future court reporting professionals. Through her leadership and foresight, Leslie has positioned Regal Court Reporting as the leading firm in California to acquire other court reporting firms that are looking to transition. Committed to maintaining the core values and philosophy of the firms they acquire, Regal Court Reporting is inspired to help other firms that are sunseting see their legacy live on through the stewardship of their firm.



Reliable Crane, Irvine

Darrell Shaw, CEO

Darrell Shaw exemplifies the quintessential American success story—an inspiring testament to hard work, perseverance, and an unwavering focus on the right goals. Beginning his career in the demanding world of crane and field operations, Shaw demonstrated an early aptitude for the



construction industry. His hands-on experience, combined with his natural talent for leadership and relationship-building, culminated in the founding of his own company in 2010. With a relentless "grind-it-out" mentality rooted in his blue-collar beginnings, Shaw propelled his company to remarkable success, achieving over \$100 million in annual revenue. His strategic approach, blending organic growth with key acquisitions, has been pivotal in reaching this milestone. Navigating the challenges of launching a business in the wake of the Great Recession, Shaw's resilience and adaptability have enabled him to steer his company through both calm and turbulent economic cycles. His ability to thrive where others have faltered is a testament to his visionary leadership and sound business acumen.

Relli Inc., Irvine

Mor Milo, CEO

Mor Milo is the CEO and founder of Relli, a pioneering platform known as "The Stock Market of Real Estate." Relli enables retail, accredited and institutional investors to engage in passive real estate investments from highly vetted sponsors across the US. By empowering Real Estate Sponsors to scale their business through REG D, REG A and REG CF publicly solicited offerings, Sponsors can increase their profit margin and operational efficiency while excellent investments to Eager Americans Investors from all Demographics. Milo brings extensive expertise in finance, HR, business administration, operations, leadership, sales, strategic partnerships, and startup development to his role.



Revive Real Estate, Irvine

Dalip Jaggi, Co-Founder & Chief Operating Officer

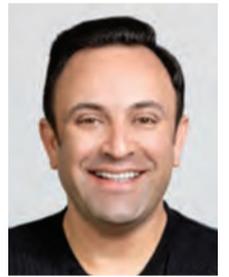
Dalip Jaggi is the co-founder and chief operating officer of Revive Real Estate, a leading presale renovation company based in Irvine. Under his leadership, Revive has garnered significant industry recognition, including the 2024 "Most Innovative Use of AI" award from Inman, highlighting the transformative impact of their AI-driven solutions in real estate. In 2023, Revive's commitment to innovation was further acknowledged with two prestigious ADDY Awards: a Silver ADDY for its mobile app and a Bronze ADDY for its website, both developed under Jaggi's guidance. Beyond his executive role, Jaggi is an active contributor to the real estate technology community. He has shared his expertise on leveraging artificial intelligence to enhance business operations, notably participating in sessions such as "Utilizing AI to Win Listings & Business" alongside industry professionals. Jaggi's entrepreneurial journey is marked by a passion for technology and innovation, consistently driving Revive to develop cutting-edge solutions that redefine the home renovation and selling experience.



Revive Real Estate, Irvine

Michael Alladawi, Founder & CEO

Michael Alladawi is the founder and chief executive officer of Revive Real Estate, a pioneering presale renovation company based in Irvine, California. With a rich background as a builder, investor, and esteemed home flipper, Alladawi established Revive in 2020 to empower homeowners to maximize their property's value through strategic



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Congratulations

As part of the OC business community, we salute all the nominees for the OCBJ Excellence in Entrepreneurship Award.

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renovations without upfront costs. Under his visionary leadership, Revive has achieved significant milestones, including winning the 2022 Pitch Battle at the National Association of REALTORS® Innovation, Opportunity & Investment Summit, underscoring the company's innovative approach in the real estate sector. In 2024, Revive was honored with the "Most Innovative Use of AI" award by Inman, highlighting the company's groundbreaking work in integrating artificial intelligence into real estate processes. Alladawi's commitment to innovation and excellence has positioned Revive as a leader in the industry, offering homeowners and agents seamless solutions to enhance property value and streamline the selling process. His dedication to creating lasting partnerships and adding value to others' lives is evident in Revive's mission and success.

RLH Equity Partners, Irvine

Murray Rudin, Managing Director

For more than 25 years, Murray Rudin has been a managing director of RLH Equity Partners, a private equity firm that partners with entrepreneurs who have built distinctive high-growth middle-market businesses. He has served as a member of the Board of Directors of many RLH portfolio companies, with an emphasis on IT consulting enterprises. Rudin has worked in all phases of the private equity process, including sourcing, evaluating, and structuring new investments as well as assisting portfolio companies with strategy development, key hiring decisions, and the exit process. He previously also served as the chief financial officer and chief compliance officer for RLH. Early in his career, Rudin practiced corporate law and was CFO of a venture capital backed medical technology business.



Shawn Zardouz MD Inc and Z Med Legal, Newport Beach

Shawn Zardouz M.D., President of Shawn Zardouz MD Inc & Founder of Z MedLegal

Dr. Shawn Zardouz is the only physician in Newport Beach and one of approximately 400 physicians in the country who are double board certified in Pain Medicine and Neurology. Dr. Zardouz began his studies at Johns Hopkins University where he graduated with a Bachelor of Arts in Public Health. He earned his medical degree from Wayne State University in Detroit, Michigan and graduated with a distinction in biomedical research. He completed his medicine internship at Loma Linda University Medical Center where he was named intern of the year. He then completed his neurology residency at University of California San Diego (UCSD). He stayed an additional year to complete his pain medicine fellowship at UCSD, which is regarded as the top fellowship program in the country by the American Academy of Pain Medicine.



Ship & Shore Environmental Inc., Signal Hill

Anoosheh Oskouian, President & CEO

In the 24 years since its inception, Ship & Shore Environmental has emerged as a prominent provider of cutting-edge clean air technologies dedicated to enhancing air quality and environmental well-being. Anoosheh Oskouian, serving as the president and CEO, guides the overall corporate strategy encompassing engineering, product development, sales, and

fabrication. Oskouian advocates for a harmonious coexistence between sustaining the manufacturing industry and preserving a clean air and environment. Ship & Shore's commitment to excellence has garnered numerous awards, recognizing its impactful contributions to clean air and sustainability initiatives. Oskouian is the only Iranian female CEO in the environmental industry. Her knowledge and experience with combustion equipment such as thermal oxidizers, catalytic oxidizers, boilers, burners, carbon and zeolite adsorption, etc. is primary to her business. In addition, waste heat recovery and energy consumption reduction is an integral part of each engineered solution.



Spice Girl Sauces / ADYA, Anaheim

Shachi Mehra, Executive Chef & Founder

Chef Shachi Mehra is the executive chef and partner of the acclaimed ADYA Restaurant and the Founder of Spice Girl Sauces. Known for her innovative approach to Indian-inspired cuisine, she has spent over a decade elevating Orange County's dining scene and beyond. A champion on Food Network's Chopped and a guest chef at Disney's Food & Wine Festival, Chef Mehra has earned national recognition for her culinary expertise. In 2021, she launched Spice Girl Sauces, a line of Indian-inspired sauces available nationwide, with exciting new flavors, spice mixes, and frozen items currently in development. ADYA has repeatedly been named one of Eater LA's "Best Restaurants in Orange County," solidifying her reputation as a leader in the regional culinary landscape. Chef Mehra was named one of Orange Coast's "Kickass Women" and currently serves as a James Beard Legacy Advisor for 2024-2025. A proud member of Les Dames d'Escoffier International, she is also committed to giving back through her work with community organizations focused on homelessness and childhood cancer. Through her cooking, she shares the rich heritage of Indian cuisine with an ever-growing audience.



Sterling Public Relations, Corona del Mar

Paula Steurer, Founder & President

Sterling Public Relations has become an in-demand firm for brands throughout California who desire a competitive edge. The firm is designed for those who are ready to reimagine, reconnect, and reignite their brand strategy, messaging, and PR efforts. Founded in 2008 by entrepreneur Paula Steurer, the firm offers full-service branding, marketing and public relations services for clients in industries including wealth management, real estate, business development, medspas and aesthetics, nonprofits, and fitness concepts among others. Leading with heart, Steurer is passionate about working with local nonprofits and is proud to represent The Drake Gives, The Literacy Project, Sherman Library & Gardens, and Casa Youth Shelter through Sterling PR. As a trusted authority among entrepreneurs and executives, Steurer has been a keynote speaker and workshop leader for nationally recognized brands such as Mindbody, Vizio, and Oracle. She will soon be on stage again, presenting for HFA Show (formerly IHRSA Convention and Trade Show) where over 10,000 health and



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Stretto, Irvine

Jonathan Carson & Eric Kurtzman, Co-CEOs

Recognized as industry innovators by Goldman Sachs, Ernst & Young, Entrepreneur Magazine and Inc. Magazine, Carson and Kurtzman leveraged their expertise as former corporate restructuring attorneys and award-winning entrepreneurs to create Stretto. Through opportunistic M&A activity and a culture of innovation, they have grown the company by identifying and entering new markets that serve legal and financial professionals. As entrepreneurial partners for more than two decades, Jonathan Carson and Eric Kurtzman share a vision and passion for building new solutions for the bankruptcy and legal services industry. They established Irvine-based Stretto to create an unparalleled portfolio of services for attorneys, consumer and corporate bankruptcy professionals and fiduciaries that streamline legal and financial matters for all involved parties. Stretto's services enable clients to focus on their transactions by alleviating case-management burdens. Carson and Kurtzman have identified new ways to serve the legal services industry and remain focused on continuing their quest to streamline the administrative aspects of legal transactions for companies, professionals, and individuals.



Sunday Brunch Agency, Huntington Beach

Rachel Svoboda, CEO

Rachel Svoboda, a trailblazing entrepreneur, philanthropist, and author, is the CEO of Sunday Brunch Agency, Orange County's first fully remote, female-owned marketing agency. Her agency specializes in tailored advertising and public relations services, helping local businesses and entrepreneurs achieve their goals. More about her innovative work can be found at Sunday Brunch Agency. Svoboda also founded Lynxx Spirits, notable for being the first bourbon produced by an all-female team and a Gold winner at the World Spirits Competition. This unique bourbon is renowned for its rich, wine-like quality. Discover Lynxx Spirits at Lynxx Spirits. As a co-founder of The Young Entrepreneur Syndicate, Svoboda extends her expertise to an online platform that imparts entrepreneurial skills to a diverse audience. This educational initiative can be explored at The Young Entrepreneur Syndicate. Additionally, Svoboda is the author of the best-selling book "Grit & Grace: A woman's ultimate guide to empowerment, personal development, business leadership & success." She also hosts The Brunch Club, a video podcast that champions female talent and leadership, further showcasing her dedication to empowering others.



Sybtex Inc., Aliso Viejo

Saman Namiranian, Founder & CEO

Saman Namiranian, chief executive officer and founder of Sybtex, Inc., is a seasoned IT executive and emerging entrepreneur with a proven track record of enhancing business growth strategies through innovative technology solutions. Passionate about delivering exceptional value, Namiranian leverages deep expertise in IT strategy, network infrastructure, and business

continuity to assist organizations in achieving their objectives efficiently and cost-effectively. With a strong emphasis on integrity, transparency, and continuous improvement, Namiranian has successfully transitioned from the corporate world to establish Sybtex as a trusted partner offering comprehensive, outsourced IT solutions. As an emerging business leader, Namiranian was recently recognized by the Greater Irvine Chamber as a 40-Under-40 Honoree. Namiranian's work directly aligns with the company's mission to provide reliable and efficient IT services that contribute positively to its clients' endeavors while minimizing financial impact. By combining a comprehensive understanding of IT requirements with the small business owner's focus on affordability and reliability, Namiranian and the Sybtex team provide clients with a genuine competitive advantage.



TailoredSpace, Laguna Niguel

Drew Sanden, Co-Founder

Since launching the coworking solutions TailoredSpace and SimplerSpace, Drew Sanden and his business partner Scott Maples, have grown their entrepreneurial endeavor into a portfolio of 12 TailoredSpace coworking sites and four SimplerSpace coworking locations across Southern California, uniquely serving the suburban business professional and providing a viable solution for landlords looking to fill space.



The Drake Gives, Laguna Beach

Alec Glasser, Founder

Entrepreneur Alec Glasser founded Laguna Beach's iconic The Drake restaurant in 2019, and established a give back initiative dedicated to supporting music education. Launching The Drake Gives, a 501(c)(3) foundation in 2021, the nonprofit provides underserved youth in public schools with music education, materials, and instruments to experience the transformative power of music. Through Glasser's vision, The Drake Gives is dedicated to ensuring that all children, irrespective of their socioeconomic status, have access to music education. To date, more than 15,000 local students have been served through The Drake Gives. Furthering his commitment, in 2023, Glasser joined forces with Dr. Richard Matthew from UC Irvine's School of Social Ecology to create the Center for The Power of Music. Together, they've built impactful programs and global partnerships that use music to inspire change. The Drake Gives also funds an annual \$100,000 scholarship program administered by the Center. These scholarships support students with financial need who integrate music into their future careers beyond traditional musical paths, including fields like medicine, social services, marketing, and sports.



The Estate Lawyers, Irvine

Amy Gostanian, Owner

Amy L. Gostanian is the founder and managing partner of The Estate Lawyers (formerly The Law Offices of Amy Gostanian PC/Gostanian Law Group, PC), which she established in 2005 with a strong commitment to solving legal challenges through dedicated advocacy. With over a decade

CONGRATULATIONS TO TOMMY BEADEL ON HIS NOMINATION FOR THE 2025 EXCELLENCE IN ENTREPRENEURSHIP AWARDS

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of experience, Gostanian has built a team of top legal professionals who share her passion for assisting clients through the complexities of incapacity and death. Certified as an Estate Planning and Trust Specialist by the California State Bar in 2010, Gostanian has successfully drafted, administered, and litigated numerous estates, delivering positive results for clients during some of their most difficult times. Known for her strategic approach, Gostanian ensures the best outcomes for clients across estate planning, administration, and litigation. Gostanian is a member of several professional organizations, including the American Bar Association and the California Bar Association. Recognized as a SuperLawyer in Trust and Estate Litigation (2020-2024), she has also served as chair of the Orange County Bar Association's Conservatorship Section and as a speaker for OCBA panels.

**The Hood Kitchen Space, Costa Mesa**

Christie Frazier, Owner & CEO

Christie Frazier is the owner of The Hood Kitchen Space, a dynamic and innovative shared kitchen facility in Orange County designed to support the growth of diverse food businesses. With six fully equipped kitchens, prep tables, and ample refrigerated, frozen, and dry storage, The Hood Kitchen Space offers an affordable, tiered-pricing model tailored to fit the needs of clients ranging from caterers and meal prep services to creators of high-end pet food and consumer packaged goods. Frazier and her dedicated team provide a welcoming, clean, and professional environment, making the complexities of operating a food business more manageable and rewarding. Frazier's commitment to her clients goes beyond providing kitchen space. She and her team guide entrepreneurs through the permitting process, working closely with the Orange County Health Care Agency and the State of California to ensure smooth approvals. Her dedication to fostering client success has earned The Hood Kitchen Space recognition in the Orange County Register. Previously, Frazier owned the Tapenade School for Cooking, showcasing her lifelong passion for the culinary arts and entrepreneurial spirit. Through her leadership, The Hood Kitchen Space continues to be a hub for culinary innovation and community connection.

**The Lukes Network, Aliso Viejo**

Jay Lukes & Anna Lisa Lukes, Co-Founders

Jay Lukes and Anna Lisa Lukes co-founded The Lukes Network (www.thelukeshnetwork.com) for the purpose of impacting the Triple Bottom Line of People, Profit and Planet for TLN's business partners. They do this through strategy, capital and fundraising and public affairs for their for-profit, non-profit and public clients.

**The Zandbergen Group, Laguna Beach**

Bart Zandbergen, Founder & CEO

Respected as a visionary for his True Wealth philosophy, Bart Zandbergen is an esteemed certified financial planner and the founder and CEO of The Zandbergen Group. With nearly 40 years of dynamic experience in the wealth management industry navigating Black Monday, the Great Recession and the COVID-19 Pandemic, Zandbergen's guidance has played a pivotal role in helping clients successfully navigate market ebbs and flows. Through his signature True Wealth tenants, Zandbergen guides his clients as they design purpose-driven financial plans that provide them with the financial independence they desire to live with intention. Educating his team on the power of the True Wealth philosophy, his leadership has helped shape the expansion of The Zandbergen Group advisors. Working with individuals, families, generational wealth, business executives and entrepreneurs, Zandbergen's vision assists clients in designing their personalized wealth building strategies. Zandbergen's expertise as an industry leader has been featured by RIA Channel while he has earned recognition as a Top Wealth Advisor in California as published in Forbes and as a Top Advisor by Advisor Hub.

**Toast Kitchen & Bakery, Costa Mesa**

Ed Lee, Co-Founder

Ed Lee is a visionary restaurateur, philanthropist, and community leader with over 40 years of experience in the restaurant and hospitality industry. As co-founder of Toast Kitchen & Bakery, Lee has redefined dining in Orange County, blending innovative cuisine with a mission to give back. Toast has donated over \$300,000 to local nonprofits, making a tangible difference in the community. Lee is also widely known as a co-founder of Wahoo's Fish Taco, one of the most iconic fast-casual brands in the U.S. His entrepreneurial ventures extend to Tableau Kitchen & Bar, Fill Bakeshop, and Rooster Cafe, solidifying his reputation as an industry trailblazer. In 2024, Lee was inducted into the Orange County Hall of Fame, recognizing his enduring contributions to the region's culture and economy. His accolades include OC Business Journal's Restaurateur of the Year and Pioneer of the Year by the Asian Business Association, underscoring his remarkable legacy of business success and community impact.

**TraFFix Devices, San Clemente**

Brent Kulp, President & CEO

Brent Kulp started in the highway safety business in 1988 when he joined a very young, start-up company, called TraFFix Devices, Inc. founded by Kulp's father, Jack in 1987. At that time Kulp worked as the Western Region Sales Manager for TraFFix covering everything from Texas up to North Dakota and all states west from there including Western Canada. In 1998, Kulp was promoted to VP Sales and Marketing where he managed a team of sales and marketing professionals covering the entire US while still having direct sales responsibility for the untapped International market. In 2020, Kulp assumed the role of president and CEO of TraFFix Devices which requires him to be involved in all aspects of the business including manufacturing, distribution, automation &



expansion as well as new product development. With an objective of developing and utilizing more recycled materials in many of TraFFix Devices products.

Trusted Tech Team, Irvine

Julian Hamood, Founder & Chief Visionary Officer

Julian Hamood, founder and chief visionary officer of Trusted Tech Team, is the driving force behind the company's rise as a leading Cloud Solutions Provider and Microsoft Solutions Partner. Under his leadership, TTT has consistently surpassed ambitious growth targets. Hamood founded TTT with a mission to deliver exceptional service, quality, and value for Microsoft products, helping businesses fully leverage the tools they already have. This focus has been the cornerstone of TTT's success, shaping it into an industry leader. Drawing on over 16 years of experience in IT solutions, licensing consultations, executive management, customer relations and strategic partnerships, Hamood has established TTT as a Microsoft CSP direct-bill partner, earning multiple Solutions Partner Designations and Microsoft Gold Partner competency. His strategic vision has also expanded TTT's focus on AI-driven solutions and datacenter capabilities within the Azure ecosystem. Hamood is committed to community service, actively supporting Project Youth OC, United Champions for Change, and the Wounded Warrior Project. He holds a Bachelor's degree in Business Management, Marketing & Related Support Services from California State University, Fullerton.

**US Alliance Group Inc, Rancho Santa Margarita**

Fadi Cheikha, CEO

Fadi Cheikha, born in Lebanon during its Civil War, grew up in a multicultural household and is fluent in English, Arabic, French, and Greek. By age 20, he earned dual degrees in Business Management and Economics before immigrating to the U.S. to pursue the American dream. Over three decades, he built US Alliance Group (USAG), a leading merchant service company offering solutions like merchant cash advances, ATM, credit and debit card, check, and ACH processing. Guided by a "One Stop Shop" philosophy, Cheikha's mission is to enhance efficiency for businesses. Cheikha's passion for advancement through diversification led him to establish companies in the finance, real estate, personal care, wine, and automotive industries. Alongside his success, he and his wife are committed to philanthropy, notably through their nonprofit, Aiden Whisper, which supports community projects worldwide.

**Virun Inc., Fullerton**

Philip Bromley, CEO & Co-Founder

Philip Bromley is the CEO and co-founder of VIRUN, a biotechnology company revolutionizing the pharmaceutical, dietary supplement, and food-beverage industries. With over 50 patents and patents pending globally, Bromley has developed cutting-edge technologies, including lipid-based encapsulation systems that improve the bioavailability of challenging compounds such as peptides, DHA Omega-3, astaxanthin, and NAD+. Bromley is also the co-founder of O3Smoothies, a subsidiary of VIRUN, offering innovative lipid-encapsulated algae-sourced Omega-3 DHA blends combined with MCT oil and almond butter. O3Smoothies products have earned critical acclaim, winning recognition at industry events such as the Nourish Awards. Bromley originally started in order to contract develop core drug applications to improve oral delivery of naïve peptides. Through his ventures, he developed three sectors of business; pharmaceutical, supplement and food-beverage. By utilizing simple, yet advanced technology, he developed intellectual property that was easily scaled-up from concept, clinical evaluation to production. During this process, he was able to develop additional intellectual property to increase market value for other niche product development, simultaneously.

**Westcliff University, Irvine**

Anthony Lee, President & CEO

Dr. Anthony Lee, president and CEO of Westcliff University, has redefined innovation in higher education with a focus on entrepreneurship, career readiness and global impact. Since assuming leadership of the institution in 2008, Dr. Lee has leveraged his visionary direction to achieve remarkable growth: From a student body of just 20, in 2012 to a globally diverse community of over 7,000 students in 2024. A small team of five employees in 2012 into a worldwide workforce of over 1,100 by 2024. Dr. Lee launched the College of Technology and Engineering to meet the demands of a tech-driven market, with enrollment achieving over 30% YoY growth since its inception. He has also secured prestigious WSCUC accreditation and acquiring Western State College of Law, the oldest law school in OC.

**Zion Enterprises LLC, Laguna Niguel**

Charles Zhang, Philanthropist

Charles Zhang is the founder of Zion Enterprises and a celebrated entrepreneur and success story. With only \$20 dollars in his pocket, but a strong determination to succeed, Zhang arrived in California in 1980 and began supporting himself as a restaurant dishwasher. In a few years, he founded Pick Up Stix, a popular Chinese fast food chain, which eventually expanded to more than 100 restaurants, and was later sold to TGI Fridays in 2001. He also founded Aseptic Solutions USA, the top beverage manufacturer and Zion Enterprises, a real estate development firm, focused on revitalizing communities and increasing investor value. Zhang has founded an art school, OC Music & Dance, Irvine to serve the community children. Zhang has been awarded many awards from the community and the prestigious Ellis Island Medal of Honor, bestowed on those who have made a significant contribution to the United States.



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Meet the Judges:



Michael Aceves - Managing Director & Group Manager, Flagstar Bank

Michael Aceves is the managing director & group manager for Flagstar Bank's Southern California Regional Commercial & Corporate Banking division. With over 26 years of experience and leadership roles at Union Bank and U.S. Bank, his expertise spans commercial banking, corporate solutions, environmental services, and Employee Stock Ownership Plan (ESOP) lending. He holds a Bachelor of Science in Finance from San Diego State University and has served on the Board of the Crohn's & Colitis Foundation — Orange County Chapter.



Margita Blattner - Senior Director, Orange County Community Foundation

Margita Blattner is a forward-thinking, strategic leader with over 20 years of experience in organizational growth, business development, digital transformation and philanthropy. Her achievements have spanned developing market strategies, developing new products and services, launching new business models and technologies, enhancing business value and services, diversifying revenue streams, increasing profitability, and improving internal business systems and operations for Fortune 500 businesses and non-profits. As Senior director of philanthropic strategy, Blattner partners with individuals, families, corporations, nonprofits, and the professional advisor community to craft strategies for amplified charitable giving in Orange County. She leads a development team who provide guidance on current and planned giving options, handling of illiquid assets such as real estate and private business holdings, and support the establishment of charitable funds for enduring philanthropic impact. Blattner earned an MBA in Marketing and a Bachelor of Arts.



Victor Guerrero - President & Chief Operating Officer, Infinity Bank

Victor Guerrero has dedicated over 35 years to serving the Los Angeles/Orange County communities in banking. Starting out as a teller at Bank of America in 1988, he's worked in many roles in the industry, from operations to sales, credit, and finance. Since 2018, Guerrero has been the founding executive at Infinity Bank, where he serves as president and chief operating officer, and previously served as the founding CFO of Orange County Business Bank. Guerrero finds his greatest joy in helping people achieve their dreams and goals as a banker, advisor, and partner. With 33 years of marriage and two adult sons, Guerrero's family keeps him humble and generally grounded, but never quiet!



Matt Klingbeil - Senior Vice President Relationship Manager, PNC Bank

Matt Klingbeil is a senior vice president relationship manager with PNC Bank's Commercial Banking Group in Orange County, CA. Klingbeil has over 18 years of industry experience working in commercial banking and lending in Southern California, and he holds a Bachelor's Degree in Economics from the University of Wisconsin-Madison. Throughout his career, he has consistently been recognized as a top-performing banker who continuously prioritizes his clients' needs, which has helped him earn numerous awards and promotions over the years. Klingbeil was born and raised in Northeastern Wisconsin, where he still has family that he visits frequently. He has been a resident of Huntington Beach since 2006, where he lives with his wife and two daughters. Matt is an avid sports fan (of all Wisconsin-based teams) and a live music enthusiast, and he is actively engaged in giving back to the community by volunteering his time to local non-profits and community events.



Chang Lee - Relationship Manager, PNC Bank

Chang Lee is a relationship manager at PNC's Commercial Banking Group. Lee is responsible for delivering credit products and cash management services to companies and nonprofit organizations throughout Orange County and Inland Empire. Lee works closely with C-suite professionals while advising clients on appropriate credit structures, cash flow efficiency and providing PNC's world class treasury management products and services. Lee worked at Union Bank for 18 years before joining PNC in 2024. He has been a middle market banker for over 23 years and have gained extensive experiences in credit structuring and providing value-add solutions with cash management, working capital facilities, term/equipment/real estate/acquisition and recapitalization loans to businesses in Orange County and Inland Empire. Lee holds a bachelor's degree in Economics from University of California, Irvine and a MBA in Finance from Chapman University. In his free time, Lee enjoys surfing, swimming, fishing and sometimes golfing.



Gordon S. MacLean - Audit Partner & Director, RJI International CPAs

Gordon S. MacLean, CPA is an audit partner and the director of audit services at RJI CPAs. MacLean joined RJI in 2011 and specializes in audits of publicly traded and privately held businesses in the manufacturing, technology, medical device, real estate, distribution and professional services industries. MacLean has been in public accounting for over 37 years and spent 20 years at KPMG LLP's Orange County office, including seven years as an audit partner. In addition, he spent five years as an audit partner for a large regional accounting firm located in Irvine, CA. MacLean's extensive experience includes interaction with corporate BOD's and Audit Committees. He has been involved in numerous SEC public offerings and filings, including initial public offerings, secondary offerings, spin-off transactions, public debt offerings, and private placements. He has navigated various clients through business acquisitions and divestitures and has performed due diligence for both buy-side and sell-side transactions, including quality of earnings. MacLean's background includes performing audit services for companies ranging from start-up to international, multi-billion-dollar corporations.



Richard Reisman - Publisher, Orange County Business Journal

Richard Reisman is publisher of the Orange County Business Journal. Reisman joined the Business Journal in 1990. Since then, the publication's acceptance by the business community has been dramatic. Paid circulation and advertising volume has grown significantly, making it possibly the top Business Journal in the country. Prior to the business journal, Reisman was director of marketing for the Orange County edition of The Los Angeles Times. Earlier in his career, Reisman practiced law in San Francisco and Washington, D.C. While in private practice in Washington, Reisman served as special counsel to the House Ethics Committee. Reisman holds an MBA from UCLA, where he was awarded the R.C. Baker Foundation Fellowship, and a law degree from George Washington University, where he graduated with honors. Reisman is listed in "Who's Who in America" and has served on numerous boards.



Ivo Tjan - Chairman, President & Chief Executive Officer, CommerceWest Bank

Ivo A. Tjan is the founder of CommerceWest Bank. He is currently the chairman, president and CEO of CW Bancorp and CommerceWest Bank. Founded in 2001 and headquartered in Irvine, CA, the Bank caters to businesses throughout the state of California with our digital banking platform. The Bank offers a wide range of commercial banking services, including remote deposit solutions, online & mobile banking, M&A/working capital loans, commercial real estate loans, SBA loans and treasury management services. Tjan previously held a wide range of management roles at Eldorado Bank, Home Savings of America and Great Western Bank. He was named among Orange County's Most Influential Business Leaders on the "OC500" List and as both a 2023 and 2022 Orange County Visionary by the Los Angeles Times. He was honored as the Robert Ross Founders Award Recipient from the MDA. Tjan was recognized as one of Vivid Magazine's Annual Top 10 Asian American Entrepreneurs and was also named one of OC Metro's Hottest 25 People of Orange County, California. Tjan holds a Bachelor of Arts Degree in Business Administration from California State Fullerton University.



Jeffrey M. Verdon - Partner & Chair of Asset Protection, Falcon Rappaport & Berkman LLP

As a partner at Falcon Rappaport & Berkman, Jeffrey M. Verdon is chair of the Asset Protection Practice Group, headquartered in Newport Beach, CA. For over 30 years, Verdon and his team have provided specialized taxation and estate planning services to Orange County's wealthy families and business owners, pioneering the integration of risk mitigation with advanced estate planning. Verdon authored "Estate Planning for Women Only", numerous business articles on Kiplinger's Wealth Creation column, and is a sought-after speaker at financial conferences worldwide.



David Warren - Co-Founder & Chairman of the Board, Bridgeford Trust Company

David Warren is president and CEO of Bridgeford Advisors and co-founder and chairman of Bridgeford Trust Company, a sister company. He is an attorney with over 20 years of professional experience practicing law and working in the financial services industry serving the trust and wealth management needs of high and ultra-high net worth families across the globe. Warren leads all planning and business development activities and brand development, working directly with families, family offices, and financial services professionals on sophisticated trust planning solutions including powerful asset protection, privacy, and state tax planning strategies. Prior to establishing Bridgeford Trust Company, Warren was recruited out of a prestigious law firm, to join the Wealth Management/Trust Department of a large regional bank as a vice president/senior trust administrator. Warren subsequently transitioned his career to Bank of New York Mellon where he worked exclusively with ultra-high net worth families on various wealth management issues.

Congratulations

2025 Nominees!



1105 Media / **Rajeev Kapur**
 608 Dahlia / **Jessica Roy**
 Albright Yee & Schmit, APC / **Clifton W. Albright**
 Alpha Motor Corporation / **Edward Lee**
 AmeriPharma, Harper's Pharmacy /
Andrew Harper
 Athletes First / **Brian Murphy**
 AURA Accounting Solutions / **Brandon Kordower**
 Austin Taylor Inc. / **Ron Viggiano**
 Avid Bioservices Inc. / **Nicholas Green**
 Beyond Fifteen Communications Inc. /
Lauren Ellermeyer
 BioPhotas Inc. / **Patrick Johnson**
 Blue C - Creative Marketing Agency / **Eric Morley**
 Blue C Creative Marketing Agency / **Jeff Bentley**
 Blue Sands Wealth / **Letitia Berbaum**
 BoozDNA Technology / **Hima Nippuleti**
 Braver Players Musical Theater Foundation /
Chelsea Braverman
 Brewery X / **Clayton Wellbank**
 bridgED manufacturing / **Karen Caswelch**
 Broco Rankin / **Sterling Peloso**
 C.W. Driver / **Brett Perkins**
 Community Catalyst / **Amber Gregg**
 Conquer Financial / **Guillermo Haro**
 Craft / **Angelo Ponzi**
 CSUF Center For Entrepreneurship /
John Bradley Jackson
 DemandSkill Inc. / **Amy Winchell**
 Ducere Global Business School / **Mat Jacobson**
 Ecotrak LLC / **Matt Singer**
 EPD Solutions Inc. / **Jeremy Krout**
 European Spa Source / **Randy Carr**

Evolution Swim Academy / **Felipe Delgado**
 Finfare Inc. / **Wayne Lin**
 FirstElement Fuel Inc. / **Joel Ewanick**
 Foster Love / **Danny Mendoza**
 FullTerra (Advanced Construction/
 Applied GeoKinetics) / **Brian Kramer**
 Gatekeeper Systems / **Robert Harling**
 Genesis Bank / **Amilcar "Amil" Aaron**
 Greenfield and Associates LLP / **Bao Luong**
 HUDDL3 Group / **Dane Groeneveld**
 HVN Development / **Tommy Beadel**
 IBEC Inc. / **Bardia Vahidi**
 Idea Hall / **Rebecca Hall**
 Innovative Construction Solutions / **Hirad Emadi**
 Jan's Health Bar / **Poppy Holguin**
 KEI Concepts / **Viet Nguyen**
 LEHR / **Daniel Hamm**
 Luxe Du Jour / **Tammy Phan**
 Managed Direct Response / **Pat Mercuri**
 MLG Attorneys at Law / **Jonathan Michaels**
 Mortenson Taggart Adams / **Michael Mortenson**
 Mountain Mike's Pizza & Juice It Up! /
Chris Britt & Ed St. Geme
 Nutri-Win / **Ephraem Okechukwu**
 O Arch Inc. / **Dickson Oi**
 Obagi / **Arash Khazei**
 OC World / **Scott Hays**
 OluKai / Archipelago Companies / **Dan McInerny**
 ON ITS AXIS / **Shelley Iocona**
 Outshine Public Relations / **Talia Samuels**
 PatientFi / **Todd Watts**
 Powerhouse+Co. / **Kristin Daher**

PRP/ TWO MASTERS / **Donald Steiner**
 Quality Health Partners / **Theresa Henry**
 Rallio / **Chuck Goetschel**
 Regal Court Reporting / **Stephanie Leslie**
 Reliable Crane / **Darrell Shaw**
 Relli Inc. / **Mor Milo**
 Revive Real Estate / **Michael Alladawi**
 Revive Real Estate / **Dalip Jaggi**
 RLH Equity Partners / **Murray Rudin**
 Shawn Zardouz MD Inc. and Z Med Legal /
Shawn Zardouz
 Ship & Shore Environmental Inc. /
Anoosheh Oskouian
 Spice Girl Sauces/ADYA / **Shachi Mehra**
 Sterling Public Relations / **Paula Steurer**
 Stretto / **Jonathan Carson & Eric Kurtzman**
 Sunday Brunch Agency / **Rachel Svoboda**
 Sybtek Inc. / **Saman Namirianian**
 TailoredSpace / **Drew Sanden**
 The Drake Gives / **Alec Glasser**
 The Estate Lawyers / **Amy Gostanian**
 The Hood Kitchen Space / **Christie Frazier**
 The Lukes Network LLC / **Jay and Anna Lisa Lukes**
 The Zandbergen Group / **Bart Zandbergen**
 Toast Kitchen + Bakery, Tableau Kitchen +
 Bar. Wahoo's Fish Tacos / **Ed Lee**
 Traffix Devices / **Brent Kulp**
 Trusted Tech Team / **Julian Hamood**
 US Alliance Group Inc. / **Fadi Cheikha**
 Virun Inc. / **Philip Bromley**
 Westcliff University / **Dr. Anthony Lee**
 Zion Enterprises LLC / **Charlie Zhang**

Luncheon & Awards Program
 March 20, 2025
 12:00 p.m. – 2:00 p.m.
 Tickets*: \$195 / Table of Ten: \$1850



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